



# State of Illinois General Navigation Manual

# 17 V1

Periscope  
HOLDINGS INC

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The information contained in this document is a general guideline for the processing of procurements using the State of Illinois BidBuy system. State of Illinois procurements must be conducted in accordance with applicable statutes and rules, including the Illinois Procurement Code. For any questions, please contact your Agency Procurement Officer (APO) or State Procurement Officer (SPO).

Note: If not an AIS Agency, some fields in the screen shots may not be available to you.

# BidBuy General Overview

## General Overview



### User Roles

#### Department Access (DA)\*

Department Access is the role for Agency requestors or end-users. Department Access gives users the ability to be a requisitioner or contract shopper.

A requisitioner is a user who creates Requisitions from scratch, while a contract shopper is able to order from existing blanket contracts only.

#### Basic Purchaser (BP)\*

Basic Purchaser (BP) is the role for Agency purchasing staffs and APOs.

Basic Purchasers can create all documents on the Agency side such as Requisitions, Bid, Purchase Orders and their related documents such as Amendments, Change Orders and revisions.

\* An approver may be configured as either a Department Access or Basic Purchaser. In addition, if a user's role is to approve only, they may be setup as a Department Access role with approval rights only, disallowing both requisitioning or contract shopping.

### General Document Structure

	Requisition Types: Open Market, Release & Demand	Bid New Public Procurement Bulletin	Purchase Order Types: Purchase Order & Master Blanket
Document Numbering	17-416CMS-BOSS4-R-101 Fiscal Year - Organization ID - Department ID - Document Letter - Record Number*	17-416CMS-BOSS4-B-87	17-416CMS-BOSS4-P-200
Document Description	Requisitions are documents that Agencies use to request goods or services. In addition to Agency approvals, CMS Bureau of Strategic Sourcing and the Governor's Office of Management and Budget will provide approval on the Requisition.	A Bid allows you to publish a request for goods and services in BidBuy, and have registered vendors login, view and ultimately quote on those bids. BidBuy can help you to choose the best quote, award the Bid (Bid Tab**) and convert the Bid to a Purchase Order/Contract.	Purchase Orders are used to purchase goods or services. In addition, they communicate details about the purchase both to the public, vendor(s) and the State that need to know about the purchase (i.e. accounting, requestor). Contract amendments may be applied to Purchase Orders via Change Orders.
Legacy System	Procurement Business Case (Remedy), IGPS, Surveys, Procurement File	Illinois Procurement Bulletin for General Services, Procurement File	IGPS, Procurement File

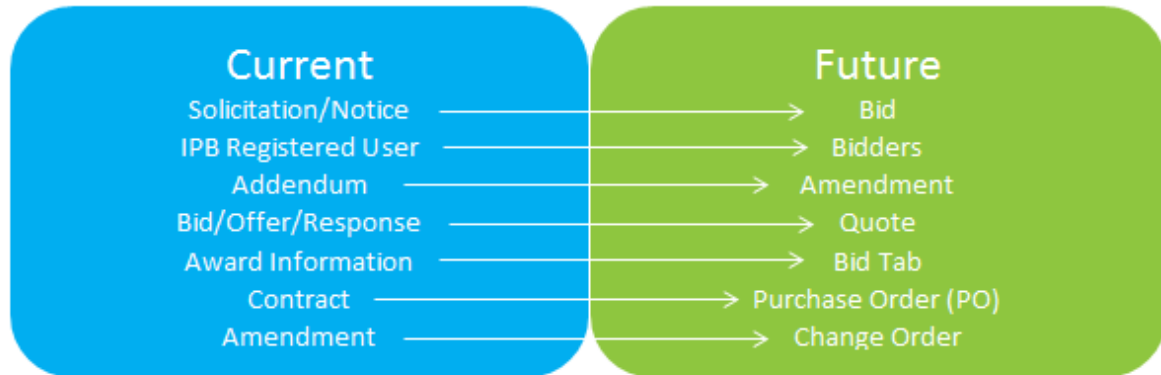
\*Record Numbers are generated based on a number wheel exclusive to each of the 3 documents. (i.e. Req, Bid, PO) As a result, a Requisition's record number may be 300, while the associated Purchase Order is 102.



\*\* The Bid Tab is a sub-document of the Bid where Vendor Quotes are tabulated, and where an award is recorded.


**Remember!** Use the symbol to quickly and easily search for any document available to you.

## Terms Crosswalk



## General Process Workflows

Included below is a high level walkthrough of the most common BidBuy process workflows.

 - Each process step affords the opportunity for approvals to occur based on identified criteria, including Agency department, location, procurement amount, NIGP codes, user role and accounting.

**Small Purchase** – Begins with an Open Market Requisition, then converted to a Purchase Order.



**Competitive Solicitation** – Begins with an Open Market Requisition, which is converted to a Bid for public solicitation. Once quotes are obtained, the Bid Tab is opened and vendor is awarded. The Bid Tab is then converted to a Purchase Order.



**Release (Order Against Contract)** – Begins with a Release Requisition, then converted to a Purchase Order.



**Renewal** – Begins with an Open Market Requisition referring to the associated Purchase Order/Contract. The Requisition is converted to a Bid and the Bid Tab is completed with the renewal amount(s). Finally, a Change Order is created against the original Purchase Order/Contract for the Renewal terms.



**Change Order** – Begins with an Open Market Requisition referring to the associated Purchase Order/Contract. The Requisition is converted to a Bid and the Bid Tab is completed with the change order amount(s). Finally, a Change Order is created against the original Purchase Order/Contract based on the Change Order terms.



# Overview & Outcomes

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This document is a reference guide to BP and DA users to enable the users to navigate the BidBuy application. For the purposes of this document, the primary focus will show the BP user access, but will note the differences in BP and DA access when applicable. For additional detail for each role, see the online help, or question mark icon, for role specific help.

## Basic Purchasing User (Internal)

The Basic Purchasing User can create and process different types of requisition documents (open market, release, and demand), create and process formal and informal bid documents and create and process different types of purchase order and change order documents as listed below:

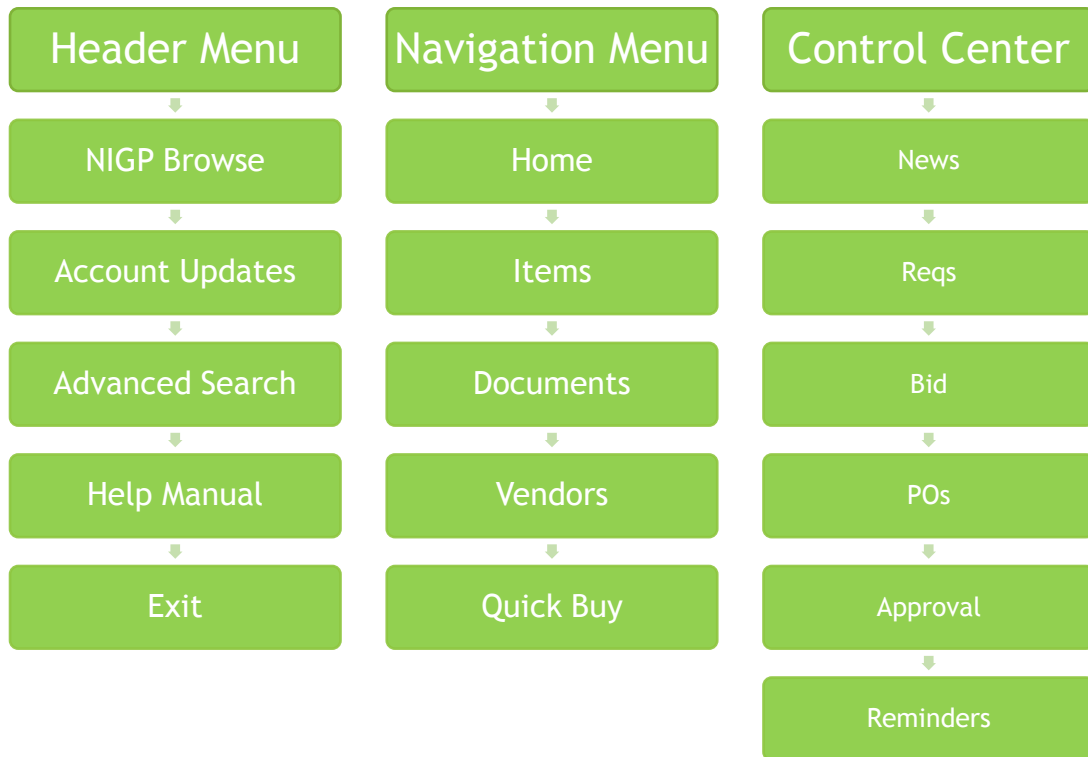
- ❖ **Release Requisition** – Release off Master Blanket
- ❖ **Open Market Requisition** – RFP, IFB, Create Blanket Contract, formal solicitation and small purchase
- ❖ **Demand Requisition** – Survey
- ❖ **Open Market Bid (formal)** - RFP, IFB, Create Blanket Contract
- ❖ **Informal Quote** – Small Purchase (from Open Market Requisition)
- ❖ **Blanket Purchase Order** – term contract agreement
- ❖ **Open Market Purchase Order** - RFP, IFB, Create Blanket Contract, small purchase
- ❖ **Assign Approvers**
- ❖ **Approve documents**

## Department Access User (Internal)

The Department Access User can create and process requisition documents (open market and release), approve documents, initiate change orders as listed below:

- ❖ **Release Requisition** – Release off Master Blanket
- ❖ **Open Market Requisition** – RFP, IFB, Create Blanket Contract, formal solicitation and small purchase
- ❖ **Informal Quote** – Small Purchase (from Open Market Requisition)
- ❖ **Approve documents**

# Home Page



# Understand Home Page Navigation

Under the **Basic Purchasing** or **Department Access** tab, the home page is divided into four areas:

1. **Role Tabs** – User role controls access in the system. Tabs will only appear if the user has more than one role assigned.
2. **Header Menu** – NIGP browse, account setup, search, help manual, and exit
3. **Navigation Menu** – navigate to Home Page, Items search, Documents, Vendors and Quick Buy
4. **Control Center** – fluid navigation of News, Reqs, Bids, POs, Approvals and Reminders

The screenshot shows the BidBuy Illinois eProcurement home page. The page is divided into four areas as described in the list:

- 1. **Role Tabs**: The 'Basic Purchasing' tab is selected, and the 'Department Access' tab is also visible.
- 2. **Header Menu**: The header includes the BidBuy logo, user role tabs, and navigation links.
- 3. **Navigation Menu**: The navigation menu includes links for Home, Items, Documents, Vendors, and Quick Buy.
- 4. **Control Center**: The control center displays a 'Home - Welcome Back Basic Purchasing' message and a table of news items.

News ID	Effective Date	Category	Title
1	06/30/2015	Events	Test

**Role Tabs**, **Header Menu** and **General Navigation Menu** are consistent for each screen. **Control Center** is a summary of BidBuy activity and is fluid depending on updates that are dynamically created by each section.

## Role Tabs

If the user has multiple roles within BidBuy (for example you are a Basic Purchasing User as well as a Department Access User for the State), the user sees tabs as indicated below. Each role within the application has its own control center. For more information on the control center, see the Control Center section.

1. Click **Basic Purchasing** tab

The screenshot shows the BidBuy Illinois eProcurement home page with the 'Basic Purchasing' tab selected. The page displays the same header and navigation menu as the previous screenshot, but the control center is not visible.



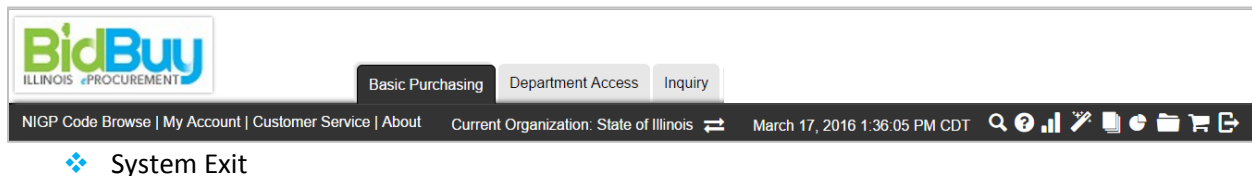
If the User has one role, then the role tab does not appear.



## Header Menu

The **Header Menu** is static and always displayed at the top of each page. This menu allows the user to access:

- ❖ NIGP Code Browse
- ❖ My Account
- ❖ Customer Service
- ❖ About
- ❖ Current Organization
- ❖ BidBuy Date Time
- ❖ Advanced Search (for the user's organization)
- ❖ Help Manual (role specific)
- ❖ Reporting Dashboard (access dependent on State configuration)
- ❖ Ad Hoc Reporting (access dependent on State configuration)
- ❖ Form Builder (access dependent on State configuration)
- ❖ Administrative Reports (access dependent on State configuration)
- ❖ Document Dashboard – not used by State
- ❖ G2B shopping cart – not used by State



### Header Menu: NIGP Code Browse

The NIGP Code Browse link bar allows a search of commodity codes by Class and Class Item codes set up and maintained in the BidBuy database.

The NIGP Commodity/Services Code is an acronym for the National Institute of Governmental Purchasing Commodity/Services Code. The NIGP Code is a coding taxonomy used primarily to classify products and services procured by state and local governments in North America. It is used by the State of Illinois to classify goods and services during procurement.

1. Click **NIGP Code Browse** on Header Menu

1



2. Select **NIGP Class** code from pulldown menu
3. Select **NIGP Class Item** from
4. Enter **NIGP Keyword** to search for a certain code
5. Select search type criteria by Search using drop-down

- Click **Search** to execute search

NIGP Code Browse | My Account | Customer Service | About    Current Organization: State of Illinois    March 17, 2016 1:50:01 PM CDT

Home   Items   Documents   Vendors   **Quick Buy**   Find It

### Commodity Code and Service Codes -

#### Search

NIGP Class  2

NIGP Class Item  3

NIGP Keyword

Search using  5

**NIGP Code Browse** 6

- To browse all **NIGP Class** codes, scroll-down to **NIGP Code Browse**
- Click **NIGP Class code** to view NIGP Class Item

 The State uses NIGP Class codes and NIGP Class Items – 5 digit NIGP codes.

### Commodity Code and Service Codes - Batson Salt

#### Search

NIGP Class

NIGP Class Item

NIGP Keyword

Search using

#### NIGP Code Browse

<a href="#">01</a>	Administrative, Financial, and Management Services
<a href="#">02</a>	Agricultural Equipment and Supplies
<a href="#">03</a>	Arts, Crafts, Entertainment, Theatre
<a href="#">04</a>	Automotive Products, Vehicles
<a href="#">05</a>	Building Equipment, Supplies
<a href="#">06</a>	Clothing, Textiles, Laundry
<a href="#">07</a>	Communication Equipment
<a href="#">08</a>	Computers, Software, Supplies
<a href="#">03</a>	Arts, Crafts, Entertainment, Theatre
<a href="#">037</a>	AMUSEMENT, DECORATIONS, ENTERTAINMENT, GIFTS, TOYS, ETC.
<a href="#">050</a>	ART EQUIPMENT AND SUPPLIES
<a href="#">052</a>	ART OBJECTS
<a href="#">232</a>	CRAFTS, GENERAL
<a href="#">233</a>	CRAFTS, SPECIALIZED
<a href="#">580</a>	MUSICAL INSTRUMENTS, ACCESSORIES, AND SUPPLIES
<a href="#">855</a>	THEATRICAL EQUIPMENT AND SUPPLIES
<a href="#">860</a>	TICKETS, COUPON BOOKS, SALES BOOKS, STRIP BOOKS, ETC.

## Header Menu: My Account

**My Account** allows the user to update their user profile.

1

1. Click **My Account** on Header Menu
1. Click **Edit** to change user profile information
2. Update information
3. Click **Reset** to clear all fields
4. Click **Save and Exit** to leave the page
5. Click **Save & Continue** to save and add more information

The screenshot shows the 'My Account Information' page on the BidBuy website. A green line with numbered callouts (1-6) highlights the workflow for editing a user profile:

- 1**: Points to the 'My Information' tab in the left sidebar.
- 2**: Points to the 'Edit' button next to the 'My Information' tab.
- 3**: Points to the 'Current Password\*' field.
- 4**: Points to the 'New Password\*' field.
- 5**: Points to the 'Confirm Password\*' field.
- 6**: Points to the 'Cancel & Exit' button at the bottom right.

The main form area contains the following fields:

- Salutation: Dr.
- First Name\*: Laura
- Last Name\*: Batson
- Job Title\*: President
- Department: Department
- Email\*: test123@gmail.com
- Company: Batson Salt
- Phone: (312)320-4306
- Salutation: Dr.
- First Name\*: Laura
- Last Name\*: Batson
- Job Title\*: Test user
- E-mail\*: laura.batson@catconsult.com
- Phone\*: (555) 555 - 5555
- Ext.:
- Mobile Phone: ( ) -
- Mobile Provider:
- Change Password: Confirm Password:
- Login Question\*: What is your father's middle name?
- Login Answer\*: Gregg
- Proxy User: Johnson, Rachel ☒ Activate Proxy User
- Default Homepage Tab for Basic Purchasing: Requisition
- Default Homepage Tab for Department Access: Requisition
- Default Homepage Tab for Inquiry: News
- Select Dashboard Report:
- User Manual Version: Standard
- Current Password\*:
- New Password\*:
- Confirm Password\*:

Buttons at the bottom: Save & Exit, Save & Continue, Reset, Cancel & Exit.

6. Click **Cancel & Exit** to remove updates and leave the page

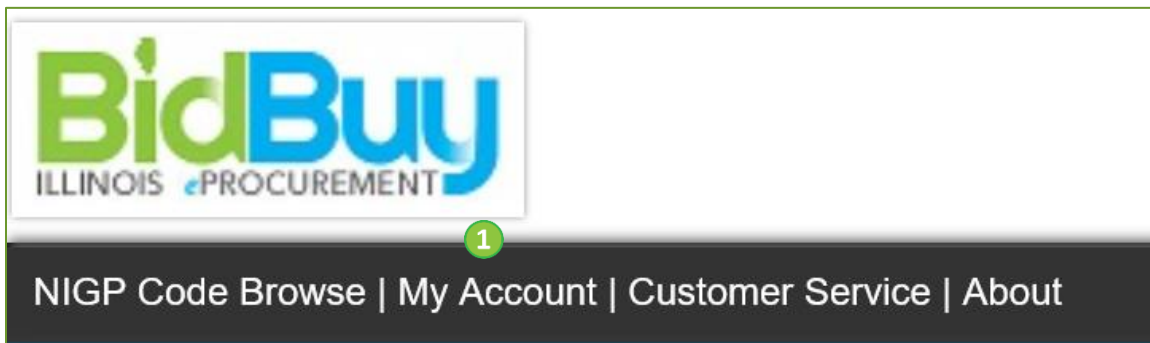
## Password Reuse

When a user attempts to change their password with a previously used password, the BidBuy Password Reuse Prevention feature will check the number of resets allowed prior to permitting reuse.



The State of Illinois requires users not be able to reuse the past 12 passwords.

1. Click on **My Account** to edit Password or other account information.



2. Click **Edit** and BidBuy will direct the user to **My Information** page

## My Account Information 2

**My Information**

Salutation			
First Name	Basic	Last Name	Purchasing
Job Title	Trainer	Department	TEST02 - TEST02
Email	aly@prosigmapartners.com		
Phone	3125555555		
Proxy User			

### 3. Re-enter new password in **Confirm Password**

**My Information**

Salutation:

First Name\*:

Basic

Last Name\*:

Purchasing

Job Title\*:

Trainer

E-mail\*:

aly@prosigmapartners.com

Phone\*:

(312)

555

-

5555

Ext.

Mobile Phone:

( )

-

Mobile Provider

Change Password:

3

Confirm Password:

Login Question\*:

What is your father's middle name?

Login Answer\*:

Saad

Proxy User:

(No Proxy)

☐ Activate Proxy User

Default Homepage Tab for Basic Purchasing:

News

Default Homepage Tab for Department Access:

News

Default Homepage Tab for Inquiry:

News

Select Dashboard Report:

User Manual Version:

Standard

Current Password\*:

Please enter current password to confirm user profile changes

Save & Exit

Save & Continue

Reset

Cancel & Exit

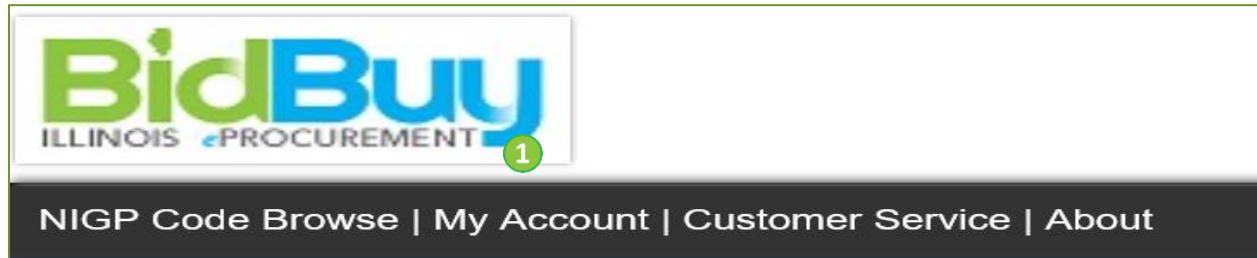


System will display Error if the password was previously used.

## Set/Clear Proxy User

Use the Proxy User dropdown menu to designate a BidBuy user access to approve documents on your behalf in BidBuy. The Proxy is required to have rights to approve documents in BidBuy. When 'Activate Proxy User' is checked, the proxy will see documents ready for your approval available in their Approvals tab and receive emails when new approvals are submitted to you.

1. Click on **My Account** to designate a Proxy User



2. Click **Edit** system will direct user to **My Information** page

### My Account Information

**My Information** **Edit** 2

**Error Page**

**Error**

- Exception Occurred: Password cannot be a recently used password.. There is a system error. Please contact the system administrator for help. Your reference error ID is: ERR00001852.

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<b>Email</b>	aiy@prosigmapartners.com
<b>Phone</b>	3125555555
<b>Proxy User</b>	

3. Select a proxy user from drop down **Proxy User**
4. Select **Activate Proxy User**
5. Click **Save & Exit** to save and exit

- Click **Save & Continue** to save and continue

**My Information**

Salutation:

First Name\*:  Last Name\*:

Job Title\*:

E-mail\*:

Phone\*:  Ext.


Mobile Phone:

Mobile Provider:

Change Password:  Confirm Password:

Login Question\*:

Login Answer\*:

Proxy User:  ☐ Activate Proxy User 

Default Homepage Tab for Basic Purchasing:

Default Homepage Tab for Department Access:

Default Homepage Tab for Inquiry:

Select Dashboard Report:

User Manual Version:

Current Password\*:  **5** Please enter current password to confirm user profile changes **6**

- Click **OK** on pop up to confirm change

prosigmapartners.com

555 - 5

our father's mid

hlin, Tom

☒ Activate Proxy User

**This site says...**

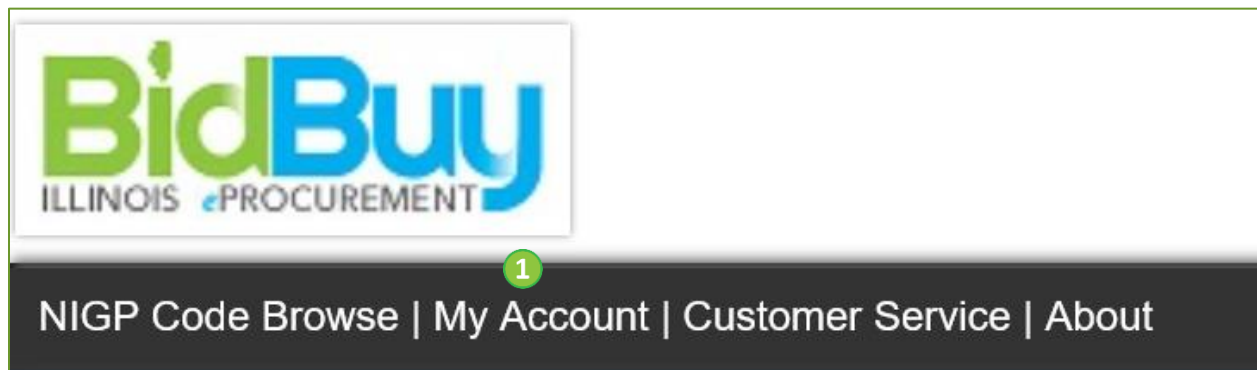
I am acknowledging that the proxy user being assigned has the appropriate agency rights to perform actions on behalf of the user specified.

☐ Don't let this page create more messages

**7**

## Set Default Homepage Tab

The Basic Purchasing or Department Access User may select a tab to start on when logging into the user's home page. Use the dropdown menu to designate the preferred document type to default to



upon viewing the home page. Click **My Account** to edit user Password

1. Click **Edit** and the system will direct the user to **My Information** page

## My Account Information


**My Information**

Edit

Salutation			
First Name	Basic	Last Name	Purchasing
Job Title	Trainer	Department	TEST02 - TEST02
Email	aly@prosigmapartners.com		
Phone	3125555555		
Proxy User			



2. Select **Default Homepage Tab** for **Basic Purchasing** role from drop down
3. Select **Default Homepage Tab** for **Department Access** role from drop down
4. Select **Default Homepage Tab** for **Inquiry** role from drop down

 The Default Homepage is only available for the Roles the user has in BidBuy. Example, if the user is only a BP user, they will only see the option for “Default Homepage Tab for Basic Purchasing.”

5. Click **Save & Exit** to save and exit
6. Click **Save & Continue** to save and continue

**My Information**

Salutation:

First Name\*:  Last Name\*:

Job Title\*:

E-mail\*:

Phone\*:  Ext.

Mobile Phone:

Mobile Provider:

Change Password:  Confirm Password:

Login Question\*:

Login Answer\*:

Proxy User:  ☐ Activate Proxy User

Default Homepage Tab for Basic Purchasing:  **3**

Default Homepage Tab for Department Access:  **4**

Default Homepage Tab for Inquiry:  **5**

Select Dashboard Report:


User Manual Version:

Current Password\*:  **6** Please enter current password to confirm user profile changes **7**

## Header: Customer Service

The customer service screen allows the user to contact local BidBuy Support for additional information

NIGP Code Browse | My Account | **Customer Service** | About | Current Organization: State of Illinois | March 17, 2016 1:47:07 PM CDT

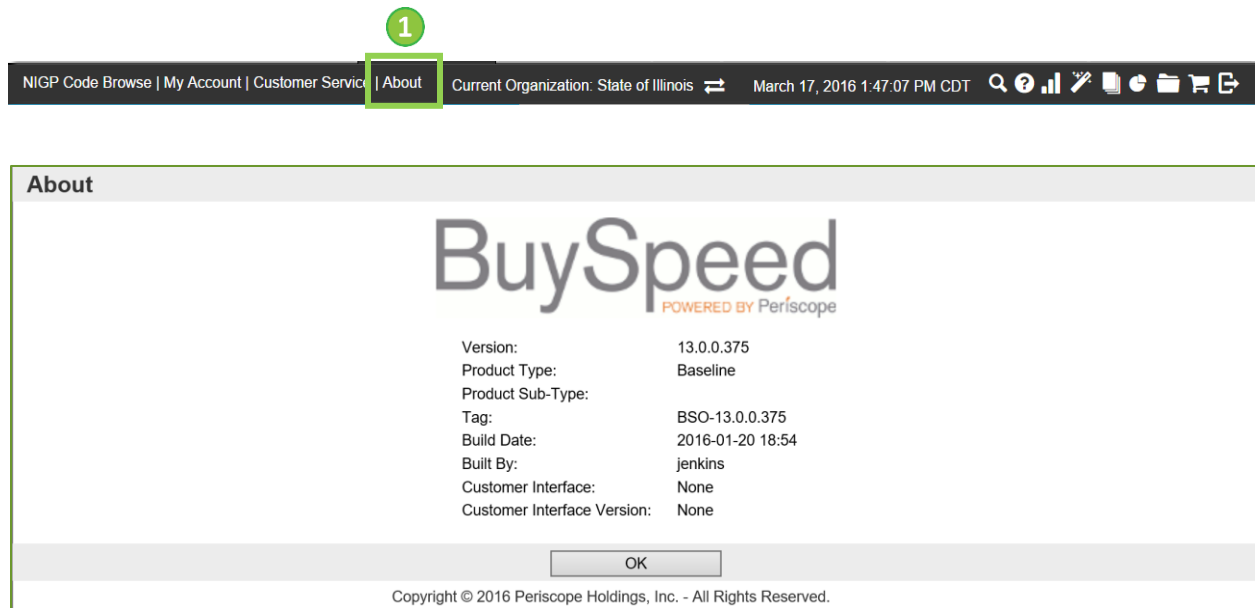
 Help will be configured to send an email to [il.bidbuy@illinois.gov](mailto:il.bidbuy@illinois.gov).

or for assistance with some of the items that are found in the BidBuy application.

## Header: About Tab

The screen shows the current version of BidBuy.

1. Click **About**



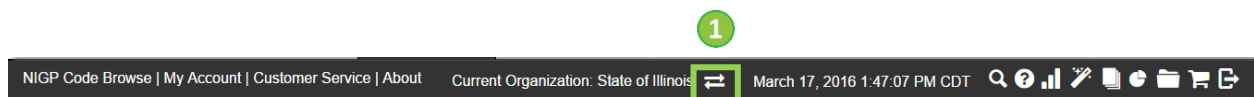
2. Click **OK** to exit

## Header Menu: Current Organization

For the State of Illinois, each organization corresponds to a State Agency. For users who have access to multiple organizations, the Current Organization will display the organization that the user is currently logged into. Access to other organizations may be granted by administrators to either BP or DA Users.

If the user has access to multiple organizations, they can change the current organization by clicking on the lookup icon.

1. Click **cross-arrows**



2. To search for an Organization, enter **search criteria**
3. Click **Find It**
4. **Select** button next to organization

2

Lookup Organization

Search Using: ALL of the criteria

Search Fields:

Organization ID

Organization Name

Fiscal Year Start

Fiscal Year End

Status

Browse by:

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

0 1 2 3 4 5 6 7 8 9

3

Find It

Clear

Select	Organization ID	Organization Name
<input type="radio"/>	0000000001	Illinois Department of Corrections
<input type="radio"/>	0000000002	CPO Capital Development Board
<input type="radio"/>	0000000003	CPO Higher Education
<input type="radio"/>	AGENCY (default)	State of Illinois
<input type="radio"/>	JOINTPURCH	Joint Purchasing

Select

Close Window

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5. Click **Select**

## Header Menu: System Date & Time

The official system date & time is very important when posting a bid to BidBuy. This clock is synchronized with the official Bid Available date/time and the Bid Opening date/time selected on the Bid by the BP User. If a Bid is not received by the State prior to the official Bid Opening date/time, it is not available for consideration by the State.

The screenshot shows the header menu with the following text: NIGP Code Browse | My Account | Customer Service | About | Current Organization: State of Illinois | March 17, 2016 1:47:07 PM CDT. The date and time are highlighted with a green box.









## Icons in the Header bar

The screenshot shows the header bar with the following text: NIGP Code Browse | My Account | Customer Service | About | Current Organization: State of Illinois | March 17, 2016 1:47:07 PM CDT. A green box highlights a series of icons: a magnifying glass, a gear, a bar chart, a document, a folder, a shopping cart, and a refresh icon.

The table below describes the features available using the specific icons.

Icon	Description
	Advanced Search – Search Bids, Commodity Codes, Purchase Orders, Vendors, Contracts, Requisitions, Quotes, and Items by multiple criteria.


19 | Page

Icon	Description
	Help – A popup help window which displays the BidBuy <b>Basic Purchasing Manual</b> or the <b>Department Access Manual</b> depending on the role selected.
	Reporting Dashboard - if available this will allow the user to view standard dashboard from BidBuy. (Access is dependent on State configuration)
	Ad Hoc Reporting – allows the user to generate ad-hoc reports using the built-in business intelligence (BI) engine if available. (Access is dependent on State configuration)
	Form Builder – allows the user to modify and view agency forms used in all documents if available. (Access is dependent on State configuration)
	Administrative Reports – allows the user to view standard reports made available. (Access is dependent on State configuration)
	Document Dashboard (This is not used by the State at this time)
	G2B Punchout (This is not used by the State at this time)
	Logout – logs the user out of BidBuy

 Only Icons that the user is granted access to will be displayed.

## Header Menu: Advanced Search

**Advanced Search** allows the user to search in the Purchasing Module for various document types.

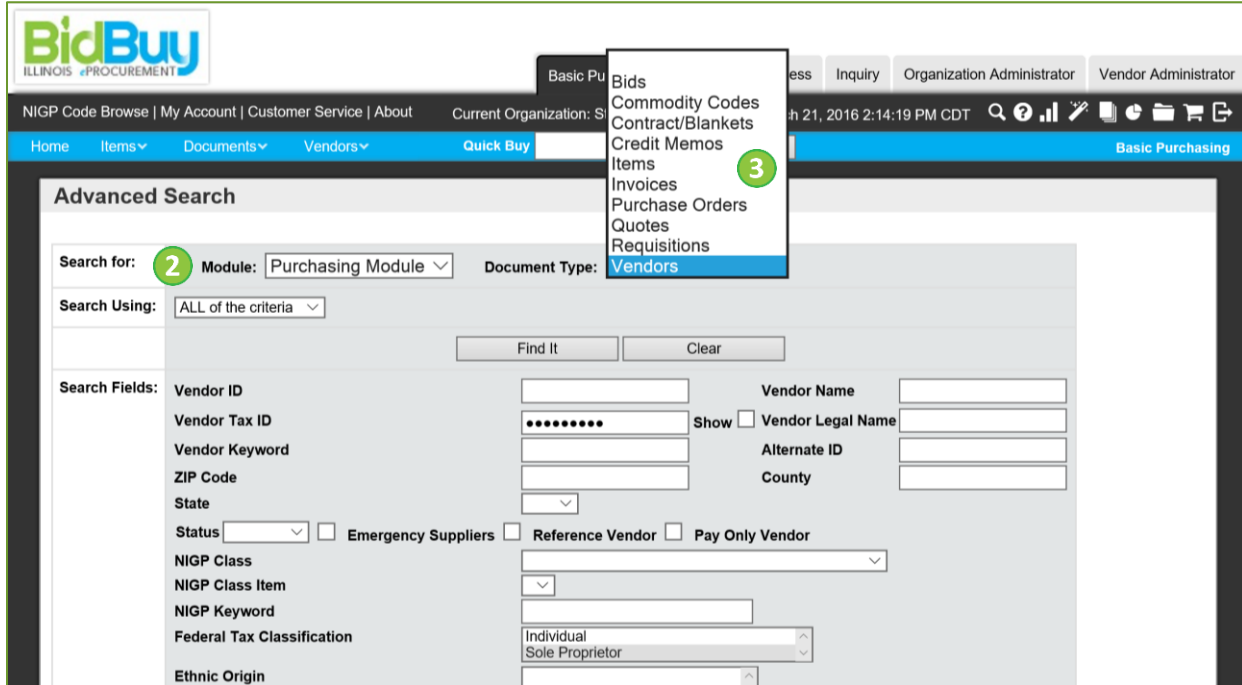
1. Click **Search** Icon 
2. Select **Purchasing Module**
3. From drop-down, select **Document Type**

Available document types are:

- ❖ **Commodity Codes** – search commodity codes in BidBuy
- ❖ **Contract/Blankets** – search blanket / contracts in BidBuy
- ❖ **Credit Memos (Not used by State)** – search credit memos in BidBuy
- ❖ **Items** – search items in BidBuy
- ❖ **Invoices (Not used by the State)** – search invoices in BidBuy
- ❖ **Purchase Orders** – search Purchase Orders in BidBuy
- ❖ **Quotes** – search quotes in BidBuy
- ❖ **Requisitions** – search requisitions in BidBuy

## ❖ Vendor – search vendors in BidBuy

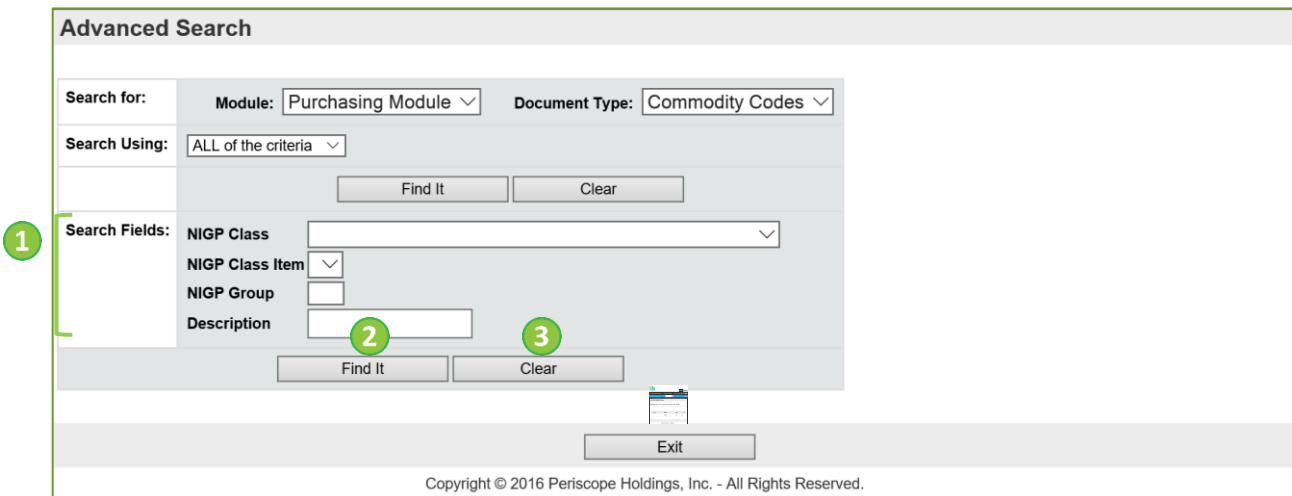
 The State only uses the Purchasing Module.



### Header Menu: Advanced Search: Bids

The Advanced Search, Bids allows users to search for Bids within the user's access. While there could be many reasons for a user to search for Bids, one example is to locate a Bid when the status is not known.

1. Enter **Search Fields**
2. Click **Find It**
3. Click **Clear** to clear the display



## Header Menu: Advanced Search: Commodity Codes

The Advanced Search, Commodity Codes allows users to search for NIGP codes.

1. Enter **Search Fields**
2. Click **Find It**
3. Click **Clear** to clear the display

**Advanced Search**

Search for: Module: **Purchasing Module** Document Type: **Bids**

Search Using: **ALL of the criteria**

**Search Fields:**

Bid #

Bid Description

Organization

Department

Location

Type Code

Catalog

Purchase Method

NIGP Class

NIGP Class Item

Commodity Code

Bid Opening Date(MM/DD/YYYY)

Purchaser

Entered Date(MM/DD/YYYY)

**Find It** **Clear**

4. Click **Exit** to exit

## Header Menu: Advanced Search: Contract/Blankets

The Advanced Search, Contract/Blankets allows users to search for Master Blanket Purchase Orders within the user's access. While there could be many reasons for a user to search for Master Blanket Purchase Orders, one example is to locate a contract if the status is not known.

1. Enter **Search Fields**
2. Click **Find It**
3. Click **Clear** to clear the display

**Advanced Search**

Search for: Module:  Document Type:

Search Using:

**Search Fields:**

Contract/Blanket #	<input type="text"/>	PO Type	<input type="text"/>
Contract/Blanket Description	<input type="text"/>	Buyer	<input type="text"/>
Header Major Status	<input type="text"/>	Vendor Legal Name	<input type="text"/>
Vendor Name	<input type="text"/>	Bid #	<input type="text"/>
Type Code	<input type="text"/>		
Catalog	<input type="text"/>		
Expiration Date(MM/DD/YYYY): From:	<input type="text"/>	To:	<input type="text"/>
Item Description	<input type="text"/>		
Organization	<input type="text"/>		
NIGP Class	<input type="text"/>		
NIGP Class Item	<input type="text"/>		
Commodity Code	<input type="text"/>	Stock Item Number	<input type="text"/>

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4. Click **Exit** to exit

## Header Menu: Advanced Search: Items

The Advanced Search, Items allows users to search for Items within the user's access. While there could be many reasons for a user to search for Items, one example is to determine if certain items had been ordered previously in BidBuy.

1. Enter **Search Fields**
2. Click **Find It**
3. Click **Clear** to clear the display

Advanced Search

Search for:

Module: Purchasing Module

Document Type: Items

Search Using:

ALL of the criteria

Find It

Clear

1 Search Fields:

PO #

Header Description

Vendor Name

Vendor Legal Name

Department

Location

Item Description

NIGP Class

NIGP Class Item

Commodity Code

Release #

PO Type

Major Header Status

3PA - Approved

3PCA - Canceled

2

3

Store Item Number

Find It

Clear

Exit

4. Click **Exit** to exit

## Header Menu: Advanced Search: Purchase Orders

The Advanced Search, Purchase Orders allows users to search for any type of Purchase Order within the user's access. While there could be many reasons for a user to search for Purchase Orders, one example is to view Purchase Orders with a specific Type Code.

1. Enter **Search Fields**
2. Click **Find It**
3. Click **Clear** to clear the display



**Advanced Search**

Search for: Module: **Purchasing Module** Document Type: **Purchase Orders**

Search Using: **ALL of the criteria**

**Find It** **Clear**

**1** Search Fields:

PO #	<input type="text"/>	Release Number	<input type="text"/>
PO Description	<input type="text"/>	Alternate ID	<input type="text"/>
PO Type	<input type="text"/>	Buyer	<input type="text"/>
Requestor	<input type="text"/>		
Header Major Status	<input type="text"/>		
Header Minor Status	<input type="text"/>		
Department	<input type="text"/>		
Location	<input type="text"/>		
Type Code	<input type="text"/>	PO Date(MM/DD/YYYY)	<input type="text"/>
Catalog	<input type="text"/>		
Required Date(MM/DD/YYYY)	<input type="text"/>	Update Date(MM/DD/YYYY)	<input type="text"/>
Vendor ID:	<input type="text"/>	Vendor Name:	<input type="text"/>
Fiscal Year	<input type="text"/>	Vendor Legal Name:	<input type="text"/>
Organization	<input type="text"/>	Item Description	<input type="text"/>
NIGP Class	<input type="text"/>		
NIGP Class Item	<input type="text"/>		
Commodity Code	<input type="text"/>	Stock Item Number	<input type="text"/>

**2** **3**

**Find It** **Clear**

**Exit**

4. Click **Exit** to exit

## Header Menu: Advanced Search: Quotes

The Advanced Search, Quotes allows users to search for Quotes within the user's access. While there could be many reasons for a user to search for Quotes, one example is to address a Vendor's question regarding their Quote.

1. Enter **Search Fields**
2. Click **Find It**
3. Click **Clear** to clear the display
4. Click **Exit** to exit

**Advanced Search**

Search for: Module: **Purchasing Module** Document Type: **Quotes**

Search Using: **ALL of the criteria**

**Find It** **Clear**

**1** Search Fields:

Quote #	<input type="text"/>	Bid #	<input type="text"/>
Quote Description	<input type="text"/>		
Vendor Name	<input type="text"/>	Vendor Legal Name	<input type="text"/>
Department	<input type="text"/>		
Location	<input type="text"/>		
Item Description	<input type="text"/>		
NIGP Class	<input type="text"/>		
NIGP Class Item	<input type="text"/>		
Commodity Code	<input type="text"/>		

**2** **3**

**Find It** **Clear**

**Exit**

## Header Menu: Advanced Search: Requisitions

The Advanced Search, Requisitions allows users to search for Requisitions within the user's access. While there could be many reasons for a user to search for Requisitions, one example is to locate a Requisition when the status is not known.

1. Enter **Search Fields**
2. Click **Find It**
3. Click **Clear** to clear the display
4. Click **Exit** to exit

The screenshot shows the 'Advanced Search' interface for 'Requisitions'. At the top, 'Search for:' is set to 'Module: Purchasing Module' and 'Document Type: Requisitions'. Below this, 'Search Using:' is set to 'ALL of the criteria'. A green circle with the number '1' points to the 'Search Fields' section on the left. This section contains a list of fields: Req #, Buyer, Current Major Status, Current Minor Status, Department, Location, Type Code, Catalog, Required Date(MM/DD/YYYY), Requestor, NIGP Class, NIGP Class Item, Commodity Code, and Vendor ID. Each field has a corresponding input box or dropdown menu. A green circle with the number '2' points to the 'Find It' button at the bottom of the search fields. A green circle with the number '3' points to the 'Clear' button at the bottom of the search fields. At the bottom right of the form, there is an 'Exit' button.

## Header Menu: Advanced Search: Vendors

The Advanced Search, Vendors allows users to search for any registered Vendor in BidBuy. While there could be many reasons for a user to search for Vendors, one example is to review a Vendor's certifications.

1. Enter **Search Fields**
2. Click **Find It**
3. Click **Clear** to clear the display

## Advanced Search

Search for: Module:  Document Type:

Search Using:

**2** Find It **3** Clear

**1** Search Fields:

Vendor ID	<input type="text"/>	Vendor Name	<input type="text"/>
Vendor Tax ID	<input type="text" value="....."/>	Show <input type="checkbox"/>	Vendor Legal Name <input type="text"/>
Vendor Keyword	<input type="text"/>	Alternate ID	<input type="text"/>
ZIP Code	<input type="text"/>	County	<input type="text"/>
State	<input type="text"/>		
Status <input type="text"/>	<input type="checkbox"/> Emergency Suppliers	<input type="checkbox"/> Reference Vendor	<input type="checkbox"/> Pay Only Vendor
NIGP Class	<input type="text"/>		
NIGP Class Item	<input type="text"/>		
NIGP Keyword	<input type="text"/>		
Federal Tax Classification	<input type="text" value="Individual"/> <input type="text" value="Sole Proprietor"/>		
Ethnic Origin	<input type="text" value="Asian / Pacific Islander"/>		
Gender	<input type="text" value="Female Owned"/>		
Veteran	<input type="text" value="Veteran Owned"/>		


4. Click **Exit** to exit

**4** Exit

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## Header Menu: Help

The Help Icon displays a reference manual for the software before being configured for the State. The online help can be used to find system field descriptions and system functionality explanations. The Help Manual is specific to the role selected by the user. State- specific BidBuy Manuals are available on the login page.

1. Click **Help** Icon  the user is directed to the **BuySpeed Online User** manual
2. Scroll down to the **Table of Contents**
3. Click on **topic** and the user views the topic in the manual

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BuySpeed supports the National Institute of Governmental Purchasing (NIGP) code as the baseline commodity coding structure. If another commodity code structure, such as the United Nations Standard Products and Services Code® (UNSPSC®) is provided as part of your BuySpeed implementation, system menus will appear differently.

September 9, 2015

## Table of Contents

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[BuySpeed Access](#)

[Verify/Change Email](#)

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[Forgot Password](#)

[Suspended Account](#)

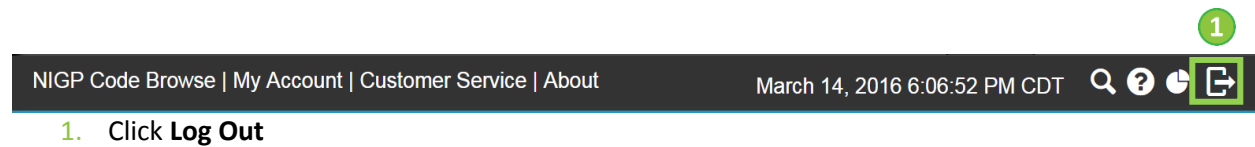
[Invalid Login Id or Password](#)


[User Lockout](#)

[Concurrent Session Management](#)

## Header Menu: Log Out

This allows the user to exit BidBuy.




 BidBuy automatically logs users off of the system after 30 minutes of inactivity. The user lockout for entering incorrect passwords is 15 minutes.

## Navigation Menu

The **Navigation Menu** allows the user to move within the application and gives access to requisitions, open and closed bids, purchase orders, contracts, quotes and account maintenance.

The **Navigation Menu** is static and always displayed at the top of each page. This menu allows the user to access:

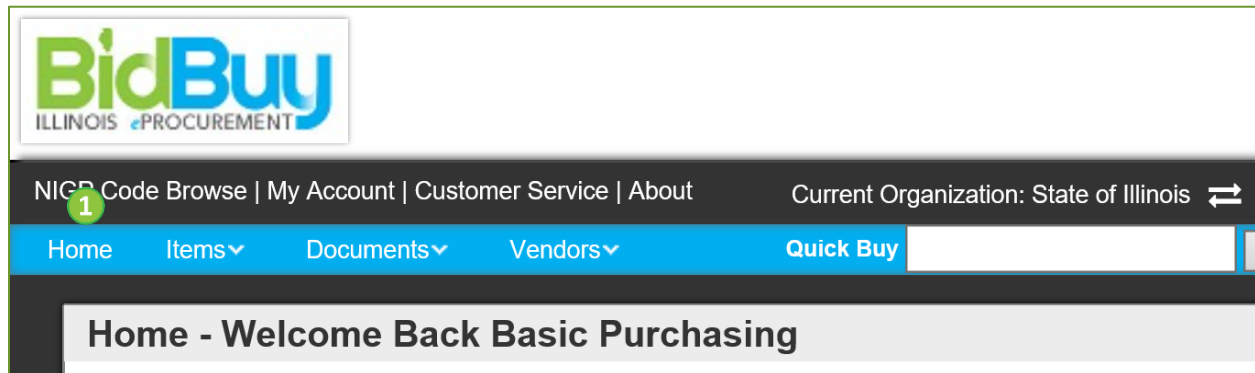
 The Help Manual for the generic BuySpeed System displays on separate tab. BuySpeed is the system name for BidBuy.

- ❖ Home
- ❖ Items
- ❖ Documents
- ❖ Vendors
- ❖ Quick Buy
- ❖ User Name

## Navigation Menu: Home

The **Home** Tab brings the user to the same set of tabs covered in the Home Page/Control Center section. It is the landing page that BidBuy opens to on successful Login.

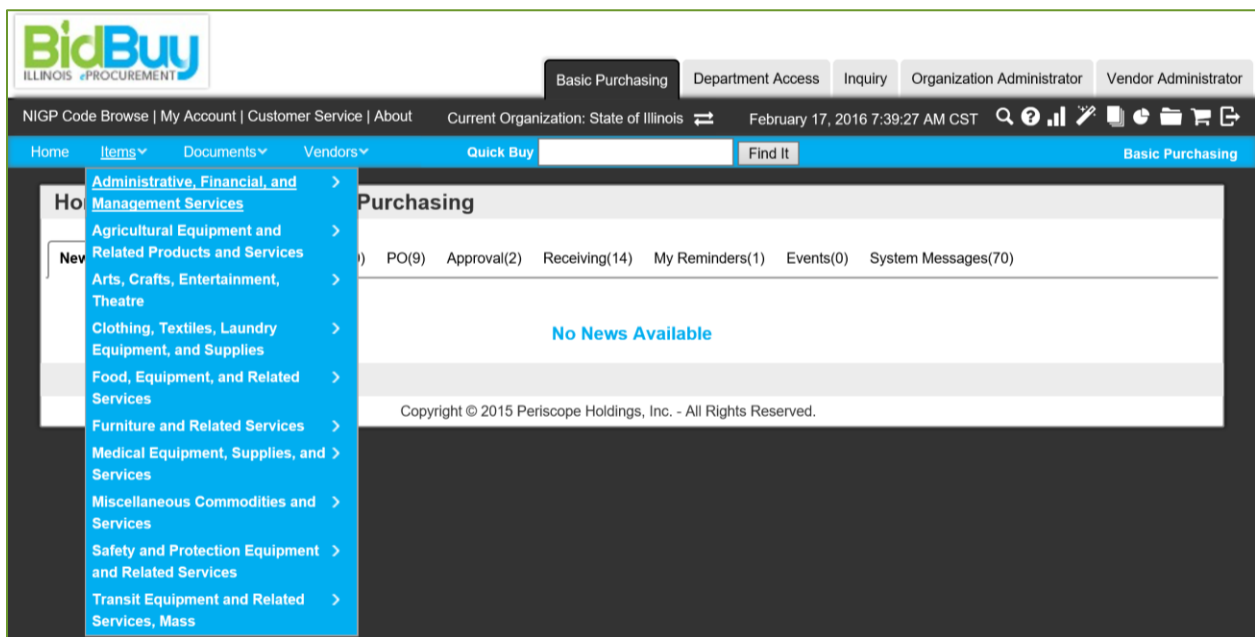
## 1. Click **Home**



### Navigation Menu: **Items**

The Items menu shows groupings of items on all blanket Purchase Orders (POs) created in the BidBuy system. The link populates the NIGP categories and the arrows to the right of those headings will provide a drop down list of the Class/Class Items of that super-group.

This link ONLY searches items that are on Master Blanket Purchase Orders.

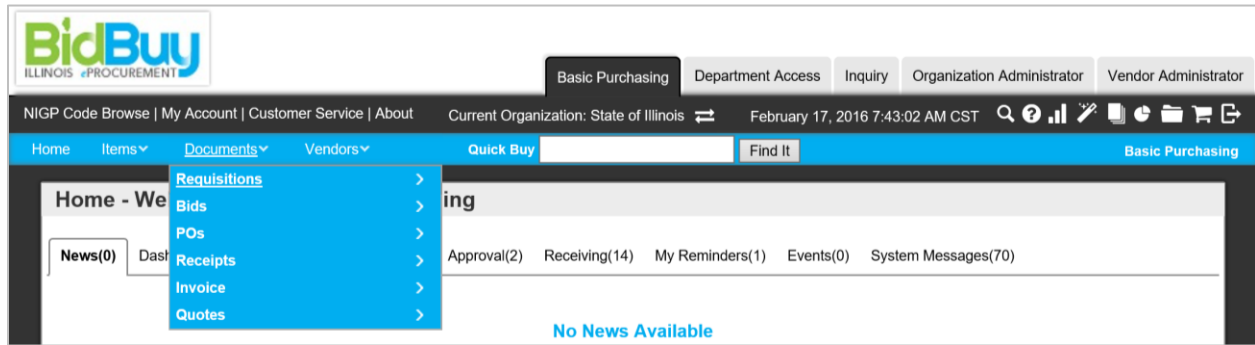


### Navigation Menu: **Documents**

The Documents menu includes navigation to documents filtered by its current status, BidBuy documents are

- ❖ **Requisitions** to locate requisition documents in BidBuy
- ❖ **Bids** to locate bid documents in BidBuy
- ❖ **POs** to locate PO documents in BidBuy
- ❖ **Receipts** to locate receipt documents in BidBuy (Not used by the State)
- ❖ **Invoice** to locate invoices in BidBuy (Not used by the State)

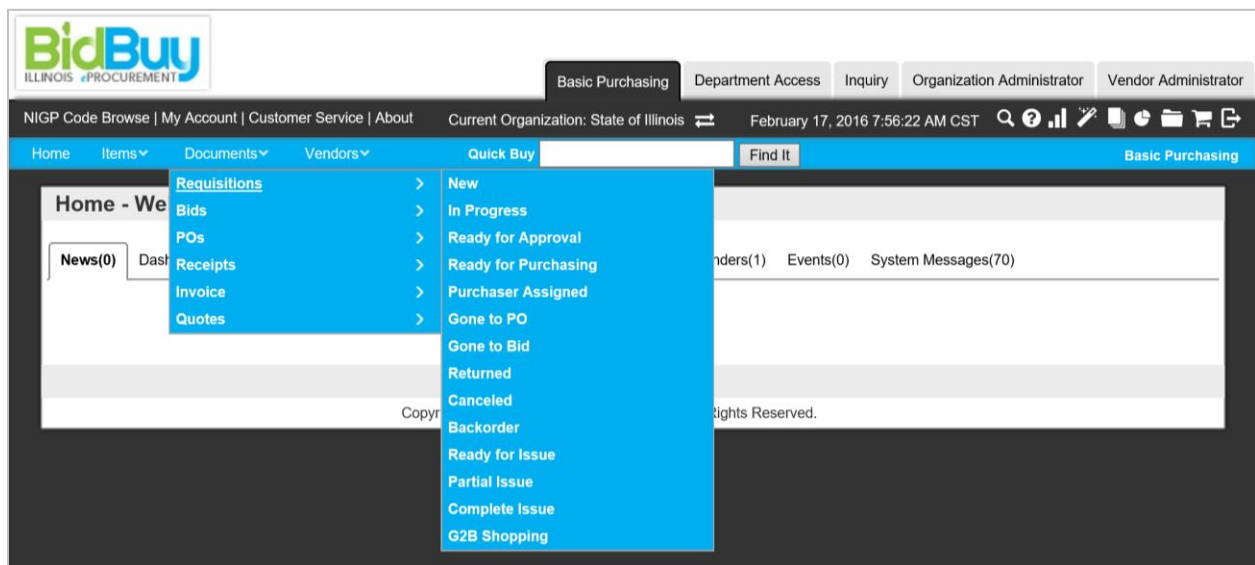
❖ **Quotes** to locate quotes in BidBuy



## Requisitions

From the dropdown selections the user can select:

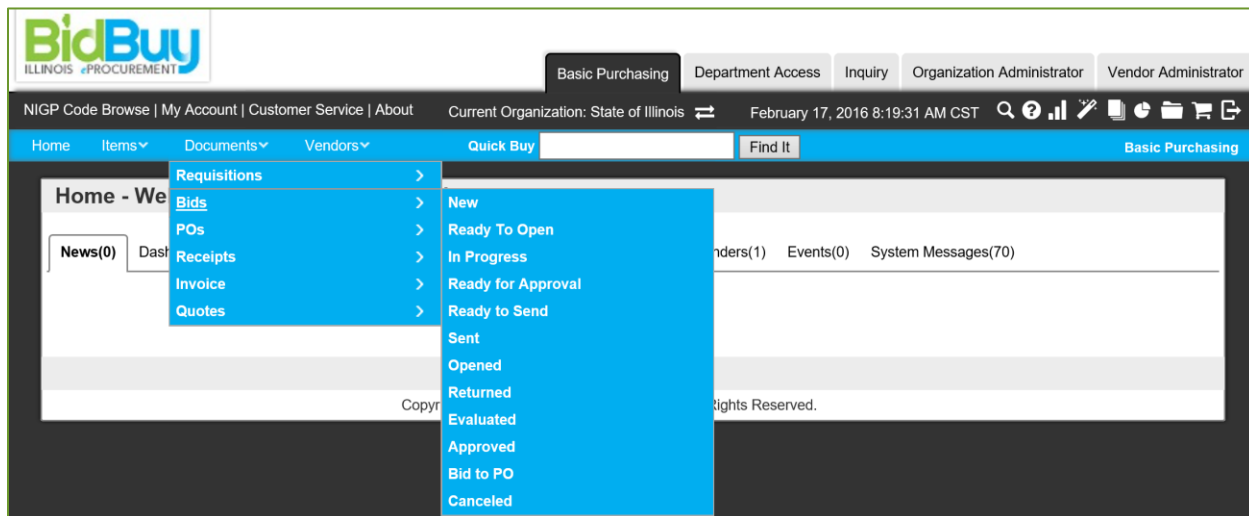
- ❖ **New** to create a new requisition
- ❖ **In Progress** to view all in progress requisitions
- ❖ **Ready for Approval** to view all ready for approval requisitions
- ❖ **Ready for Purchasing** to view all ready for purchasing requisitions
- ❖ **Purchaser Assigned** to view all purchaser assigned requisitions
- ❖ **Gone to PO** to view all gone to PO requisitions
- ❖ **Gone to Bid** to view all gone to bid requisitions
- ❖ **Returned** to view all returned requisitions
- ❖ **Cancelled** to view all cancelled requisitions
- ❖ **Backorder** to view all backorder requisitions (**not used by State of Illinois**)
- ❖ **Ready for Issue** to view all ready for issue requisitions (**not used by State of Illinois**)
- ❖ **Partial Issue** to view all partial issue requisitions (**not used by State of Illinois**)
- ❖ **Complete Issue** to view all complete issue requisitions (**not used by State of Illinois**)
- ❖ **G2B Shopping Punchout** (if configured, not used by the State currently)



## Bids

From the dropdown selections the user can select:

- ❖ **New** to create a new bid (BP only)
- ❖ **Ready to Open** to view all ready to open bids (BP only)
- ❖ **In Progress** to view all in progress bids
- ❖ **Ready for Approval** to view all ready for approval bids
- ❖ **Ready to Send** to view all ready to send bids
- ❖ **Sent** to view all sent bids
- ❖ **Opened** to view all open bids
- ❖ **Returned** to view all returned bids
- ❖ **Evaluated** to view all evaluated bids
- ❖ **Approved** to view all approved bids
- ❖ **Bid to PO** to view all bids converted to PO
- ❖ **Cancelled** to view all cancelled bids

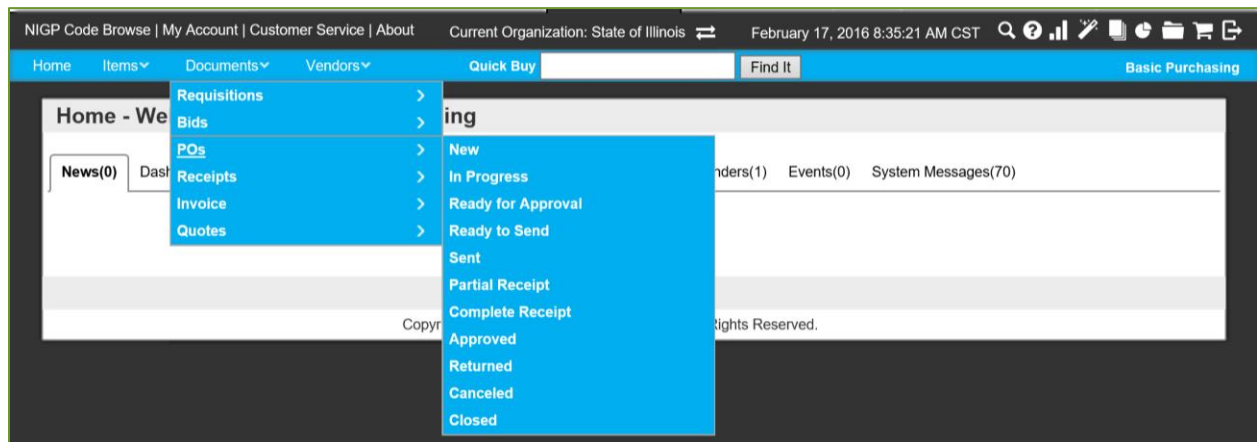


## POs

From the dropdown selections the user can select:

- ❖ **New** to create a new PO (BP only)
- ❖ **In Progress** to view all in progress POs
- ❖ **Ready for Approval** to view all ready for approval POs
- ❖ **Ready to Send** to view all ready to send POs
- ❖ **Sent** to view all sent POs
- ❖ **Partial Receipt** to view all partial receipt POs
- ❖ **Complete Receipt** to view all complete receipt POs
- ❖ **Approved** to view all approved POs

- ❖ **Returned** to view all returned POs
- ❖ **Cancelled** to view all canceled POs

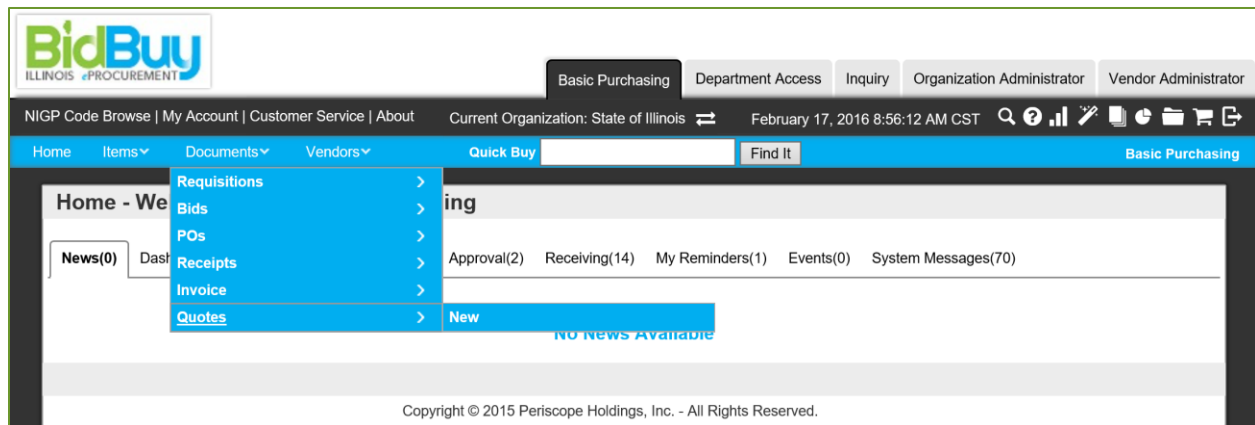


- ❖ **Closed** to view all closed POs

## Receipts and Invoices (Not used by the State)

### Quote

Select the dropdown link to enter new vendor quote for a Bid that has been opened. This is done when a Quote is submitted outside of BidBuy by a Vendor, for instance when the Quote is mailed in as a hardcopy or via fax.

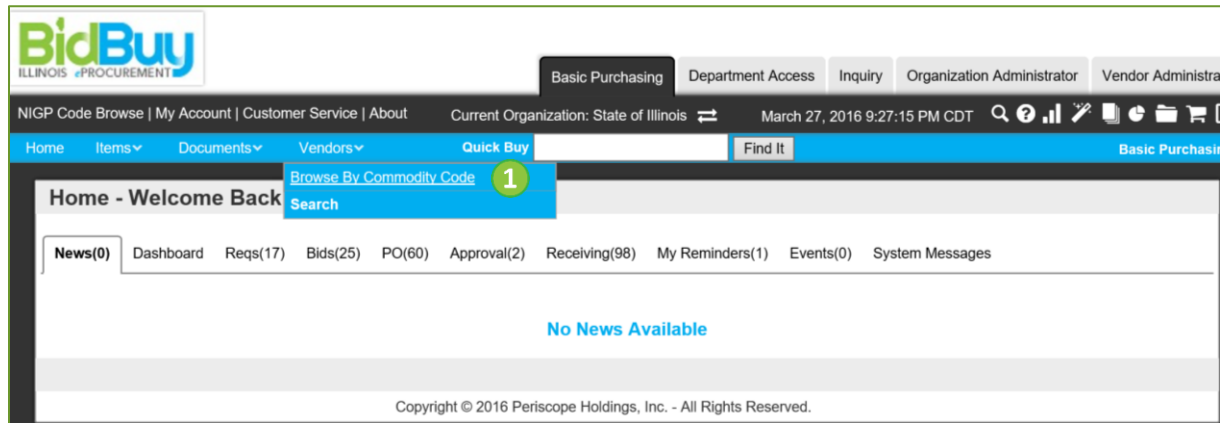


## Browse Vendors by Commodity Code

If a user wants to find which vendors have registered as providing a particular commodity, from the Vendor dropdown menu, select Browse by Commodity Code hyperlink to display the NIGP three digit classes. The State uses NIGP codes to classify goods and services.



1. Select **Browse By Commodity Code**



2. Click the three-digit commodity code class hyperlink to view the five digit class/subclass

3. Click **Cancel** to cancel

**Browse Vendor By Commodity Code**

<a href="#">005</a>	<b>2</b> ABRASIVES
<a href="#">010</a>	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES
<a href="#">015</a>	ADDRESSING, COPYING, MIMEOGRAPH, AND SPIRIT DUPLICATING MACHINE SUPPLIES: CHEMICALS, INKS, PAPER, ETC.
<a href="#">019</a>	AGRICULTURAL CROPS AND GRAINS INCLUDING FRUITS, MELONS, NUTS, AND VEGETABLES
<a href="#">020</a>	AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)
<a href="#">022</a>	AGRICULTURAL EQUIPMENT AND IMPLEMENT PARTS
<a href="#">025</a>	AIR COMPRESSORS AND ACCESSORIES
<a href="#">031</a>	AIR CONDITIONING, HEATING, AND VENTILATING EQUIPMENT, PARTS AND ACCESSORIES (SEE CLASS 740 ALSO)
<a href="#">035</a>	AIRCRAFT AND AIRPORT EQUIPMENT, PARTS, AND SUPPLIES
<a href="#">037</a>	AMUSEMENT, DECORATIONS, ENTERTAINMENT, GIFTS, TOYS, ETC.
<a href="#">040</a>	ANIMALS, BIRDS, MARINE LIFE, AND POULTRY, LIVE, (INCLUDING ACCESSORY ITEMS)
<a href="#">045</a>	APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE
<a href="#">050</a>	ART EQUIPMENT AND SUPPLIES
<a href="#">052</a>	ART OBJECTS
<a href="#">055</a>	AUTOMOTIVE ACCESSORIES FOR AUTOMOBILES, BUSES, TRAILERS, TRUCKS, ETC.
<a href="#">060</a>	AUTOMOTIVE AND TRAILER EQUIPMENT AND PARTS
<a href="#">065</a>	AUTOMOTIVE AND TRAILER BODIES, BODY ACCESSORIES, AND PARTS
<a href="#">070</a>	AUTOMOTIVE VEHICLES AND RELATED TRANSPORTATION EQUIPMENT (INCLUDING TRAILERS) (EFFECTIVE 1-1-06 THIS CLASS INACTIVATED, REFER TO CLASSES 071, 072 AND 073)
<a href="#">071</a>	AUTOMOBILES, SCHOOL BUSES, SUVs, AND VANS (INCLUDING DIESEL, GASOLINE, ELECTRIC, HYBRID, AND ALL OTHER FUEL TYPES)
<a href="#">072</a>	TRUCKS (INCLUDING, DIESEL, GASOLINE, ELECTRIC, HYBRID, AND ALTERNATIVE FUEL UNITS)
<a href="#">073</a>	TRAILERS
<a href="#">981</a>	RENTAL OR LEASE OF GENERAL EQUIPMENT (HVAC, ATHLETIC, FIRE AND POLICE PROTECTION, ETC.)
<a href="#">983</a>	RENTAL OR LEASE SERVICES OF CLOTHING, JANITORIAL, LAUNDRY, LAWN, PAINTING, SPRAYING, LABORATORY AND TEXTILE EQUIPMENT
<a href="#">984</a>	RENTAL OR LEASE SERVICES OF COMPUTERS, DATA PROCESSING, AND WORD PROCESSING EQUIPMENT
<a href="#">985</a>	RENTAL OR LEASE SERVICES OF OFFICE, PHOTOGRAPHIC, PRINTING, RADIO/TELEVISION/TELEPHONE EQUIPMENT
<a href="#">988</a>	ROADSIDE, GROUNDS, RECREATIONAL AND PARK AREA SERVICES
<a href="#">989</a>	SAMPLING AND SAMPLE PREPARATION SERVICES (FOR TESTING)
<a href="#">990</a>	SECURITY, FIRE, SAFETY, AND EMERGENCY SERVICES (INCLUDING DISASTER DOCUMENT RECOVERY)
<a href="#">992</a>	TESTING AND CALIBRATION SERVICES
<a href="#">998</a>	SALE OF SURPLUS AND OBSOLETE ITEMS

**3**

Cancel

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4. Click **the** five-digit commodity code **hyperlink** to view vendors
5. Click **Cancel** to Return to the commodity class level page

**Browse Vendor By Commodity Code**

<a href="#">005</a>	<b>4</b> ABRASIVES
<a href="#">005-00</a>	ABRASIVES
<a href="#">005-05</a>	Abrasives Equipment and Tools
<a href="#">005-14</a>	Abrasives, Coated: Cloth, Fiber, Sandpaper, etc.
<a href="#">005-21</a>	Abrasives, Sandblasting, Metal
<a href="#">005-28</a>	Abrasives, Sandblasting, Other than Metal
<a href="#">005-42</a>	Abrasives, Solid: Wheels, Stones, etc.
<a href="#">005-56</a>	Abrasives, Tumbling, Wheel
<a href="#">005-63</a>	Compounds, Grinding and Polishing: Carborundum, Diamond, etc. (See Class 075 For Valve Grinding Compounds)
<a href="#">005-70</a>	Pumice Stone
<a href="#">005-75</a>	Recycled Abrasives, Products and Supplies
<a href="#">005-84</a>	Wool, Steel, Aluminum, Copper, and Lead

**5**

Cancel

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- Click the vendor name **hyperlink** to display a pop-up of the vendor profile information

**Browse Vendor By Commodity Code**

[005](#) ABRASIVES  
[005-05](#) Abrasive Equipment and Tools

6

☐ [Acme123](#)  
☐ [Joe's Car Wash, LLC](#)  
☐ [mitzi's business](#)  
☐ [testtesttesttest](#)

Cancel

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**Vendor Profile - Acme123**

Organization Information Users Address Commodity Codes and Services Regions Terms & Categories Attachments Vendor Performance

**General Organization Information**

<b>Vendor ID:</b>	00000031	<b>Alternate ID:</b>		<b>Company Name:</b>	Acme123
<b>Vendor Legal Name:</b>	Acme123	<b>Status:</b>	Active	<b>Status Change Reason:</b>	
<b>Tax ID Type:</b>	SSN	<b>Incorporation Details - State:</b>		<b>Year of Incorporation:</b>	0
<b>Tax ID#:</b>	*****6696	<b>Business Description:</b>	Hewlett Packard	<b>Preferred Delivery Method:</b>	Email
<b>Vendor Email:</b>	brock.fotis@catconsult.com	<b>Vendor Fax:</b>		<b>1099 Vendor:</b>	No
<b>Comment:</b>					
<b>Emergency Supplier:</b>	No				
<b>Emergency Phone:</b>					
<b>Emergency Contact Name:</b>					
<b>Emergency Email:</b>					
<b>Emergency Info Comment:</b>					
<b>Referenced Vendor:</b>	No				
<b>User Last Updated:</b>	ACME123	<b>Date Last Updated</b>	11/18/2015 10:59:21 AM		

Close Window

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- Click **Close Window** to exit

## Navigation Menu: Quick Buy

Quick Buy is a feature in BidBuy that allows the user to search for items available under blanket contracts directly from the tool bar. Quick Buy is an alternate way to create a new requisition document. The system will search by item description.



Full functionality of Quick Buy is in the specific procurement manuals.

## Control Center

The **Control Center** is organized by tabs and allows the user to navigate to specific information in BidBuy. **Control Center** tabs are:

- ❖ News
- ❖ Dashboard
- ❖ Reqs
- ❖ Bids
- ❖ PO
- ❖ Approval
- ❖ Receiving (not used by State currently)
- ❖ My Reminders
- ❖ Events (not used by State currently)
- ❖ System Messages

### Control Center: News

1. Click **News (count)** to displays News Items
2. Click News ID for document to view
3. Click **Exit** to exit

Basic Purchasing

Department Access

[NIGP Code Browse](#) | [My Account](#) | [Customer Service](#) | [About](#)

Current Organization: State of Illinois

April 26, 2016 12:28:20 PM CDT

Home

Items

Documents

Vendors

Quick Buy

Find It

Basic Purchasing

Home - Welcome Back Basic Purchasing

News(1)

Dashboard

Reqs(1)

Bids(22)

PO(90)

Approval(0)

Receiving(84)

My Reminders(0)

Events(0)

System Messages

1

News ID	Effective Date	Category	Title
2 1	06/30/2015	Events	Test

News Details

News ID

1

Effective Date

06/30/2015

End Date

06/30/2018

Category

Events

Title

Test

News

Test

Link

3

Exit

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News: Displays System Administrator created updates

## Control Center: Dashboard

1. Click **Dashboard** to view Reporting Dashboard for the Organization and Role as configured
2. Any configured reports will display otherwise red error

Home - Welcome Back Basic Purchasing

News(1)

Dashboard

Reqs(1)

Bids(22)

PO(90)

Approval(0)

Receiving(84)

My Reminders(0)

Events(0)

System Messages

1

ERROR

No report could be rendered based on the criteria specified.

2

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Dashboard: Displays Information Dashboard if configured.

## Control Center: Reqs

The requisition statuses shown here indicate requisitions that may require some action to be taken.

### Reqs: In Progress

1. Click **Reqs** tab
2. Click **In Progress** sub tab to display in progress requisitions
3. Click hyperlink **Requisition #** to navigate to requisition details
4. Click **View More...** to retrieve all requisitions

Home - Welcome Back Basic Purchasing

News(0) Dashboard **1** Reqs(17) Bids(25) PO(60) Approval(2) Receiving(98) My Reminders(1) Events(0) System Messages

In Progress(8) **2** Ready for Approval(0) Ready for Purchasing(1) Returned(0) Gone to PO(8)

Requisition #	Requisition Date	Description	Type	Dept/Loc	Total
<b>3</b> <a href="#">16-AGENCY-TEST0-R-393</a>	03/01/2016	STANDA	Release	TEST02/TEST2	\$200.00
<a href="#">16-AGENCY-TEST0-R-392</a>	03/01/2016	Quick Buy Requisition	Release	TEST02/TEST2	\$590.00
<a href="#">16-AGENCY-TEST0-R-390</a>	03/01/2016	des	Inventory	TEST02/TEST2	\$0.00
<a href="#">16-AGENCY-TEST0-R-389</a>	03/01/2016	Quick Buy Requisition	Release	TEST02/TEST2	\$51,800.00
<a href="#">16-AGENCY-TEST0-R-385</a>	02/15/2016	State Use	Open Market	TEST02/TEST2	\$50,000.00

**4** [View More...](#)

### Reqs: Ready for Approval

1. Click **Reqs** tab
2. Click **Ready for Approval** subtab to display ready for approval requisitions

Home - Welcome Back Basic Purchasing

News(0) Dashboard **1** Reqs(17) Bids(25) PO(60) Approval(2) Receiving(98) My Reminders(1) Events(0) System Messages

In Progress **2** Ready for Approval(0) Ready for Purchasing(1) Returned(0) Gone to PO(8)

No records found.

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If no information exists the system displays **No records found**

## Reqs: Ready for Purchasing

1. Click **Reqs** tab
2. Click **Ready for Purchasing** to display ready for purchasing requisitions
3. Click hyperlink **Requisition #** subtab to navigate to requisition details

Home - Welcome Back Basic Purchasing

News(0) Dash **1** Reqs(17) Bids(25) PO(60) Approval(2) Receiving(98) My Reminders(1) Events(0) System Messages

In Progress(8) Ready for Approval **2** Ready for Purchasing(1) Returned(0) Gone to PO(8)

Requisition #	Requisition Date	Description	Type	Dept/Loc	Purchaser	Total
<b>3</b> <a href="#">16-AGENCY-TEST0-R-357</a>	01/25/2016	State Use	Open Market	TEST02/TEST2	Basic Purchasing	\$50,000.00


**4** [View All...](#)

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4. Click **View All** to view all ready for purchasing requisitions

## Reqs: Returned

1. Click **Reqs** tab
2. Click **Returned** subtab to display returned requisitions for the user

 If no information exists the system displays **No records found for this user.**

Home - Welcome Back Basic Purchasing

News(0) Dash **1** Reqs(17) Bids(25) PO(60) Approval(2) Receiving(98) My Reminders(1) Events(0) System Messages

In Progress(8) Ready for Approval(0) Ready for Purchasing **2** Returned(0) Gone to PO(8)

**No records found for this user.**

[View All...](#)

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3. Click **View All** to retrieve all returned POs for all users

## Reqs: Gone to PO

1. Click **Reqs** tab
2. Click **Gone to PO** subtab to display gone to PO requisitions
3. Click hyperlink **Requisition Number** to navigate to requisition details

Home - Welcome Back Basic Purchasing

News(0) Dash **1** Reqs(17) Bids(25) PO(60) Approval(2) Receiving(98) My Reminders(1) Events(0) System Messages

In Progress(8) Ready for Approval(0) Ready for Purchasing(1) Return **2** [Gone to PO\(8\)](#)

Requisition #	Requisition Date	Description	Type	Dept/Loc	Total
<b>3</b> <a href="#">16-AGENCY-TEST0-R-394</a>	03/01/2016	Release Standard priced	Release	TEST02/TEST2	\$10.00
<a href="#">16-AGENCY-TEST0-R-375</a>	02/09/2016	Small Purchase	Open Market	TEST02/TEST2	\$25,000.00
<a href="#">16-AGENCY-TEST0-R-360</a>	01/27/2016	Quick Buy Requisition	Release	TEST02/TEST2	\$49,750.00
<a href="#">16-AGENCY-TEST0-R-359</a>	01/25/2016	Quick Buy Requisition	Release	TEST02/TEST2	\$2,590.00
<a href="#">16-AGENCY-TEST0-R-352</a>	01/24/2016	State Use	Release	TEST02/TEST2	\$57,250.00

**4** [View More...](#)

- Click **View More** to retrieve more documents

## Control Center: Bids

The bid statuses shown here indicate bids that may require some action to be taken. The Bids tab is only available to BP users.

### Bids: In Progress

- Click **Bids** tab
- Click **In Progress** subtab to display in progress bids

Home - Welcome Back Basic Purchasing

News(0) Dashboard Reqs **1** **Bids(25)** PO(60) Approval(2) Receiving(98) My Reminders(1) Events(0) System Messages

[In Progress\(0\)](#) Ready for Approval(0) Ready to Send(0) Ready to Open(23) Opened(2) Approved(0)

**2** [No records found.](#)

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If no information exists the system displays **No records found.**

### Bids: Ready for Approval

- Click **Bids** tab




**Home - Welcome Back Basic Purchasing**

News(0) Dashboard Reqs **1** **Bids(25)** PO(60) Approval(2) Receiving(98) My Reminders(1) Events(0) System Messages

In Progress **2** **Ready for Approval(0)** Ready to Send(0) Ready to Open(23) Opened(2) Approved(0)

**No records found.**

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 If no information exists the system displays **No records found**

2. Click **Ready for Approval** subtab to display ready for approval bids

### Bids: Ready to Send

1. Click **Bids** tab
2. Click **Ready to Send** sub tab to display ready to send bids


**Home - Welcome Back Basic Purchasing**

News(0) Dashboard Reqs **1** **Bids(25)** PO(60) Approval(2) Receiving(98) My Reminders(1) Events(0) System Messages

In Progress(0) Ready for Appro **2** **Ready to Send(0)** Ready to Open(23) Opened(2) Approved(0)

**No records found.**

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 If no information exists the system displays **No records found**

### Bids: Ready to Open

1. Click **Bids** tab
2. Click **Ready to Open** subtab to display ready to open bids
3. Click hyperlink **Bid Number** to navigate to Bid details
4. Click **Create new quote** to create new quote

5. Click **View More** to retrieve more documents

Home - Welcome Back Basic Purchasing

News(0) Dashboard Rec **1** Bids(25) PO(60) Approval(2) Receiving(98) My Reminders(1) Events(0) System Messages

In Progress(0) Ready for Approval(0) Ready to Send **2** Ready to Open(23) Opened(2) Approved(0)

Bid #	Buyer	Description	Bid Opening Date	Open Quotes	Quote History
<b>3</b> <a href="#">-16-AGENCY-12345-B-154</a>	Maryann Miskiewicz	Software, inventory	03/18/2016 10:00:00 AM		
<a href="#">-16-AGENCY-TEST-B-114</a>	Brock Fotis	Test 11_24 #3	11/25/2015 04:42:00 PM	<b>4</b> <a href="#">Create new quote</a>	No Submitted Quotes
<a href="#">-16-AGENCY-TEST-B-117</a>	Brock Fotis	Test 12_3 #2	12/17/2015 11:02:00 AM	<a href="#">Create new quote</a>	No Submitted Quotes
<a href="#">-16-AGENCY-TEST-B-145</a>	Tom McLaughlin	sample	03/01/2016 07:00:00 PM	<a href="#">Create new quote</a>	No Submitted Quotes
<a href="#">-16-AGENCY-TEST-B-155</a>	Diane O'Brien	Test open bid search	03/17/2016 04:29:00 PM	<a href="#">Create new quote</a>	No Submitted Quotes
<b>5</b> <a href="#">View More...</a>					

## Bids: Opened

1. Click **Bids** tab
2. Click **Opened** subtab to display opened bids
3. Click hyperlink **Bid #** to navigate to bid details
4. Click hyperlink **Bid Tabulation** to navigate to bid tabulation
5. Click hyperlink **Quote History** to view quote history
6. Click hyperlink **List** to view bid holder list

Home - Welcome Back Basic Purchasing

News(0) Dashboard Rec **1** Bids(25) PO(60) Approval(2) Receiving(98) My Reminders(1) Events(0) System Messages

In Progress(0) Ready for Approval(0) Ready to Send(0) Ready to Open **2** Opened(2) Approved(0)

Bid #	Organization	Buyer	Description	Purchase Method	Bid Opening Date	Bid Tabulation	Quote History	Bid Holder
<b>3</b> <a href="#">-16-AGENCY-TEST0-B-128</a>	State of Illinois	Basic Purchasing	State Use	Open Market	01/25/2016 11:30:00 AM	<a href="#">Bid Tab</a>	<a href="#">Quote History</a>	<a href="#">List</a>
<a href="#">-16-AGENCY-TEST0-B-126</a>	State of Illinois	Basic Purchasing	State Use	Open Market	01/25/2016 10:06:00 AM	<a href="#">Bid Tab</a>		<a href="#">List</a>

**4** **5** **6**

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## Bids: Approved

1. Click **Bids** tab
2. Click **Approved** subtab to display approved bids

Home - Welcome Back Basic Purchasing

News(0) Dashboard Rec **1** Bids(25) PO(60) Approval(2) Receiving(98) My Reminders(1) Events(0) System Messages

In Progress(0) Ready for Approval(0) Ready to Send(0) Ready to Open(23) Open **2** Approved(0)

No records found.

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## Control Center: PO

The PO statuses shown here indicate Purchase Orders that may require some action to be taken. DA users will only see Purchase Orders that are Ready To Send.

### PO: In Progress

1. Click **PO** tab
2. Click **In Progress** sub tab to display in-progress POs
3. Click hyperlink **Purchase Order #** to navigate to PO details
4. Click hyperlink **Vendor Name** to navigate to vendor details

**Home - Welcome Back Basic Purchasing**

News(0) Dashboard Reqs(17) Bid **1** **PO(60)** Approval(2) Receiving(98) My Reminders(1) Events(0) System Messages

**In Progress(47)** **2** y for Approval(2) Ready to Send(11) Returned(0) Change Order(0)

Purchase Order #	Organization	Purchase Order Date	Description	Dept/Loc	Purchaser	Vendor Name	Total
<a href="#">16-AGENCY-TEST-P-151</a>	State of Illinois	03/16/2016	Spoons, plastic	TEST/TEST	Maryann Miskiewicz		\$0.00
<a href="#">16-AGENCY-12345-P-150</a>	State of Illinois	03/16/2016	Certification of TRAIN	123456789/123	Diane O'Brien	<a href="#">Batson Enterprises</a>	\$100,000.00
<a href="#">16-AGENCY-TEST-P-149</a>	State of Illinois	03/16/2016	Desserts, Frozen	TEST/TEST	Maryann Miskiewicz	<a href="#">SugarJar</a>	\$3,000.00
<a href="#">16-AGENCY-TEST-P-148</a>	State of Illinois	03/16/2016	Certification of TRAIN	TEST/TEST	Diane O'Brien	<a href="#">Batson Enterprises</a>	\$10,000.00
<a href="#">16-AGENCY-TEST0-P-146 :1</a>	State of Illinois	03/01/2016	Release Standard priced	TEST02/TEST2	Basic Purchasing	<a href="#">AD-INC</a>	\$10.00

**5** [View more...](#)

5. Click **View More...** to retrieve more PO documents

### PO: Ready for Approval

1. Click **PO** tab
2. Click **Ready for Approval** subtab to display ready for approval POs
3. Click hyperlink **Purchase Order #** to navigate to PO details

**Home - Welcome Back Basic Purchasing**

News(0) Dashboard Reqs(17) Bid **1** **PO(60)** Approval(2) Receiving(98) My Reminders(1) Events(0) System Messages

**In Progress** **2** **Ready for Approval(2)** Ready to Send(11) Returned(0) Change Order(0)

Purchase Order #	Purchase Order Date	Description	Approval Requested	Approver	Approval Status	Date Approved
<a href="#">16-AGENCY-12345-P-125</a>	12/22/2015	Open Market PO	12/29/2015 08:07:15 AM	Brock Fotis Brock Fotis Rachel Johnson	Waiting... Waiting... Waiting...	
<a href="#">16-AGENCY-12345-P-124</a>	12/21/2015	Open Market PO	12/21/2015 09:19:46 AM	Brock Fotis Brock Fotis Rachel Johnson	Waiting... Waiting... Waiting...	

## PO: Ready to Send

1. Click **POs** tab
2. Click **Ready to Send** subtab to display ready to send POs
3. Click hyperlink **Purchase Order #** to navigate to PO details
4. Click on hyperlink **Vendor Name** to navigate to vendor details

Home - Welcome Back Basic Purchasing

News(0) Dashboard Reqs(17) **PO(60)** Approval(2) Receiving(98) My Reminders(1) Events(0) System Messages

In Progress(47) Ready for Approval(2) **Ready to Send(11)** Returned(0) Change Order(0)

Purchase Order #	Organization	Purchase Order Date	Description	Dept/Loc	Purchaser	Vendor Name	Total
<a href="#">16-AGENCY-TEST0-P-139</a>	State of Illinois	02/09/2016	Small Purchase	TEST02/TEST2	Basic Purchasing	<a href="#">DAH Consulting</a>	\$25,000.00
<a href="#">16-AGENCY-TEST-P-121</a>	State of Illinois	12/11/2015	Short Description	TEST/TEST	Basic Purchasing	<a href="#">MORTON SALT INC</a>	\$0.00
<a href="#">0000108</a>	State of Illinois	11/03/2015	Code Test	TEST/TEST	Brock Fotis	<a href="#">Brock Rules, Inc.</a>	\$0.00
<a href="#">0000059</a>	State of Illinois	07/21/2015	guns and ammo	TEST/TEST	Training User 11	<a href="#">ktm holdings, llc</a>	\$0.00
<a href="#">0000058</a>	State of Illinois	07/21/2015	Pajamas for Women's Shelter	TEST/TEST	Laura Batson	<a href="#">Rachel Inc</a>	\$8,650.00

**List & Send**

5. Click **List & Send** to list and send all POs

## PO: Returned

1. Click **POs** tab

Home - Welcome Back Basic Purchasing

News(0) Dashboard Reqs(17) **PO(60)** Approval(2) Receiving(98) My Reminders(1) Events(0) System Messages

In Progress(47) Ready for Approval(2) **Ready to Send(2)** **Returned(0)** Change Order(0)

No records found.

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**i** If no information exists the system displays. No records found.

2. Click **Returned** subtab to display returned POs

## PO: Change Order

1. Click **POs** tab
2. Click **Change Order** to display **My Change Orders Ready To Send**

**Home - Welcome Back Basic Purchasing**

News(0) Dashboard Reqs(17) Bids(25) **PO(60)** Approval(2) Receiving(98) My Reminders(1) Events(0) System Messages

In Progress(47) Ready for Approval(2) Ready to Send(11) Return(2) **Change Order(0)**

**My Change Orders Ready To Send**

No records found.

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 If no information exists the system displays No records found.

## Control Center: Approval

Approvals are separated by document types: Requisitions, Bids and Purchase Orders. At the bottom center, there is a link called List & Approve.

1. Click **Approval** tab to list and approve documents pending user approval

 The approvals are categorized by My Documents Pending Approval by others and Documents Pending My Approval where the user is the approver.

2. Click **List & Approve** to approve documents

**Home - Welcome Back Basic Purchasing**

News(0) Dashboard Reqs(20) Bids(25) **Approval(4)** Receiving(99) My Reminders(1) Events(0) System Messages

**My Documents Pending Approval**

Requisition #	Requisition Date	Description	Approval Requested	Approver	Approval Status	Date Approved
<a href="#">16-AGENCY-TEST0-R-412</a>	04/21/2016	Small Purchase	04/27/2016 08:29:45 AM	Basic Purchasing	Waiting...	

**Purchase Order #** **Purchase Order Date** **Description** **Approval Requested** **Approver** **Approval Status** **Date Approved**

<a href="#">16-AGENCY-12345-P-123</a>	12/22/2015	Open Market PO	12/29/2015 08:07:15 AM	Brock Fotis Brock Fotis Rachel Johnson	Waiting... Waiting... Waiting...	
<a href="#">16-AGENCY-12345-P-124</a>	12/21/2015	Open Market PO	12/21/2015 09:19:46 AM	Brock Fotis Brock Fotis Rachel Johnson	Waiting... Waiting... Waiting...	

**Documents Pending My Approval**

Requisition #	Requisition Date	Description	Account Fiscal Year	Type	Requestor	Dept/Loc	Total
<a href="#">16-AGENCY-TEST0-R-412</a>	04/21/2016	Small Purchase	16	Open Market	Basic Purchasing	TEST02 / TEST2	\$5,000.00

**2** [List & Approve](#)

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3. Select Document to approve
4. Click **Apply Approval Action to Selected** to approve selected
5. Click **Reset** to reset display
6. Click **Cancel & Exit** to exit

**Requisitions Pending My Approval**

Select	Requisition #	Requisition Date	Description	Account Fiscal Year	Type	Requestor	Dept/Loc	Total
<input type="checkbox"/>	<a href="#">16-AGENCY-TEST0-R-412</a>	04/21/2016	Small Purchase	16	Open Market	Basic Purchasing	TEST02 / TEST2	\$5,000.00

**Approve Action:** ☒ Approve ☐ Disapprove ☐ Cancel Requisitions

**Comment:**

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## Control Center: Receiving (Not used by the State)

## Control Center: Reminders

Reminders are created by either you or other system users to remind you to take some action on a specific document by a specific time.

### Reminders: Purchase Order

1. Click **Reminders** tab
2. Click hyperlink **Purchase Order #** to navigate to PO details
3. Enter **Date Completed**
4. Click **Save & Exit** to save and exit
5. Click **Save & Continue** to save and continue
6. Click **Reset** to clear screen and start over
7. Click **Cancel & Exit** to exit
8. Click **Column heading** to sort the display

**My Reminders**

**Purchase Order(1)** Requisition(0) Bid(0) Quote(0) Invoice(0) Credit Memo(0)

<a href="#">Purchase Order #</a>	<a href="#">Due Date</a>	<a href="#">Comment</a>	<a href="#">Days Prior to Remind</a>	<a href="#">Date Completed (MM/DD/YYYY)</a>	<a href="#">Date Entered</a>	<a href="#">Entered By</a>
<a href="#">16-AGENCY-TEST-P-118</a>	12/16/2015	reminder	0	<input type="text"/>	12/08/2015 09:28:13 AM	Basic Purchasing

Please save your changes before sorting to  Otherwise, your changes will be lost.

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## Control Center: System Messages

The system messages tab displays transaction queue messages.


**My Reminders**

Purchase Order(1) **Requisition(0)** Bid(0) Quote(0) Invoice(0) Credit Memo(0)

No records found.

Exit

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 The other tabs for Requisition, Bid, and Quote work the same. If no information exists the system displays No records found.

The State does not use Invoices or Credit Memos.

1. Click **System Messages** tab

Home - Welcome Back Basic Purchasing

News(0) Dashboard Reqs(17) Bids(25) **PO(60)** Approval(2) Receiving(98) My Reminders(1) Event **1** System Messages



Select **Show All** displays all system Messages.

Select **Show Errors** displays only system errors.

Select **Show Warnings** displays only warnings.

Select **Show in Progress** displays messages for in progress documents.

### System Messages: Requisition Messages

1. Scroll down to **Requisition Messages** section
2. Select **number** of messages to display in this section
3. Click hyperlink **Document ID** to display requisition details
4. Click hyperlink **Message** to navigate to document in message
5. Select **Select** to select message
6. Click **First** to go to the first message in the queue
7. Click **Previous** to go to the previous page
8. Click **page number** to go to a page number
9. Click **Next** to go to the next page

Requisition Messages 1				
Show 5 entries 2				
Document ID	Message	Message Type	Date Created	Select
16-AGENCY-TEST-R-403 3	New bid is -16-AGENCY-TEST-B-156 4	New Document Created	03/17/2016 03:30:00 PM	<input type="checkbox"/> 5
16-AGENCY-TEST-R-401	New bid is -16-AGENCY-TEST-B-155	New Document Created	03/16/2016 04:26:53 PM	<input type="checkbox"/>
16-AGENCY-TEST-R-400	New bid is -16-AGENCY-TEST-B-152	New Document Created	03/16/2016 12:53:35 PM	<input type="checkbox"/>
16-AGENCY-TEST-R-398	Cloned requisition is 16-AGENCY-TEST-R-399	New Document Created	03/16/2016 09:37:52 AM	<input type="checkbox"/>
16-AGENCY-TEST-R-398	New Purchase Order is 16-AGENCY-TEST-P-148	New Document Created	03/16/2016 09:37:34 AM	<input type="checkbox"/>
<div> 6 7 8 9 10 First Previous 1 2 3 4 5 ... 14 Next Last </div>				

10. Click **Last** to go to last page

### System Messages: Bid Messages

1. Click **System Messages** tab, scroll down to **Bid Messages** section
2. Select **number** of messages to display in this section
3. Click hyperlink **Document ID** to display requisition details
4. Click hyperlink **Message** to navigate to document in message
5. Select **Select** to select message
6. Click **First** to go to the first message in the queue
7. Click **Previous** to go to the previous page
8. Click **page number** to go to a page number
9. Click **Next** to go to the next page



Bid Messages 1				
Show 5 2 entries				
Document ID	Message	Message Type	Date Created	Select
3 -16-AGENCY-12345-B-150	New Purchase Order is 4 -16-AGENCY-12345-P-150 : 0	New Document Created	03/16/2016 11:08:46 AM	5 <input type="checkbox"/>
-16-AGENCY-12345-B-150	Cloned bid is -16-AGENCY-TEST-B-151	New Document Created	03/16/2016 09:58:56 AM	<input type="checkbox"/>
-16-AGENCY-TEST-B-143	New Purchase Order is 16-AGENCY-TEST-P-144 : 0	New Document Created	02/28/2016 03:01:14 PM	<input type="checkbox"/>
-16-AGENCY-TEST-B-141	New Purchase Order is 16-AGENCY-TEST-P-143 : 0	New Document Created	02/10/2016 10:14:47 PM	<input type="checkbox"/>
-16-AGENCY-TEST-B-140	New Purchase Order is 16-AGENCY-TEST-P-142 : 0	New Document Created	02/10/2016 12:06:08 PM	<input type="checkbox"/>
6 7 8 9 10 First Previous 1 2 3 4 Next Last				

10. Click **Last** to go to last page

### System Messages: Purchase Order Messages

1. Click **System Messages** tab, scroll down to **Purchase Order Messages** section
2. Select **number** of messages to display in this section
3. Click hyperlink **Document ID** to display requisition details
4. Click hyperlink **Message** to navigate to document in message
5. Select **Select** to select message
6. Click **First** to go to the first message in the queue
7. Click **Previous** to go to the previous page
8. Click **page number** to go to a page number
9. Click **Next** to go to the next page
10. Click **Last** to go to last page
11. Click **Cancel & Exit** to exit

Purchase Order Messages

1

Show 

5

 entries

Document ID	Message	Message Type	Date Created	Select
<div>3</div> <div><a href="#">16-AGENCY-12345-P-122</a></div>	<div>4</div> <div>Cloned purchase order is <a href="#">16-AGENCY--P-123</a></div>	New Document Created	12/21/2015 09:47:41 AM	<div>5</div> <div><input type="checkbox"/></div>
<div>0000110</div>	<div>Cloned purchase order is <a href="#">16-AGENCY-TEST-P-111</a></div>	New Document Created	11/05/2015 04:33:14 PM	<div><input type="checkbox"/></div>

6

First

7

Previous

8

1

9

Next

10

Last

11

Cancel & Exit

# Appendix A: Unit of Measure Descriptions

BidBuy UOM	Unit of Measure Description	BidBuy UOM	Unit of Measure Description
ACR	Acre	M	Meter
AU	Activity Unit	MI	Mile
BAG	Bag	ML	Milliliter
BAR	Bar	MM	Millimeter
BT	Bottle	MON	Month
CAN	Canister	PRS	Person
CAR	Carton	OZ	Ounce
CV	Case	PAL	Pallet
CM	Centimeter	%	Percentage
CRT	Crate	PC	Piece
CCM	Cubic centimeter	PT	Pint
FT3	Cubic Foot	QT	Quart
"3	Cubic Inch	S	Second
YD3	Cubic Yard	FT2	Square foot
DAY	Days	"2	Square inch
DZ	Dozen	YD2	Square Yard
DR	Drum	TS	Thousands
EA	Each	GAL	US Gallon
FOZ	Fluid Once	LB	US Pound
FT	Foot	TON	Ton
G	Gram	WK	Week
GRO	Gross	YD	Yard
HR	Hour	YR	Year
"	Inch		
KG	Kilogram		
KM	Kilometer		
L	Liter		

# Appendix B: Forms By Process



Procurement Document					Procurement Method														
						IFB	RFP	RFI	Emr/	Sol	St	Lse/	GBS	RFI	Sml	Dem	Ord	Chg	Rnw
BidBuy Document	Owner	Document Name	Type	Location	Show Y/N	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Requisition	CPO-GS/CMIS	Cloud Computing Check Sheet	Attach	<a href="http://www.illinois.gov/ipo/general/Documents/20140812%20Open%20Operating%20Standards%20and%20-%20Cloud%20Checklist%20.pdf">http://www.illinois.gov/ipo/general/Documents/20140812%20Open%20Operating%20Standards%20and%20-%20Cloud%20Checklist%20.pdf</a>	N	X	X		X	X				X	X				
Requisition	CMIS	IT Governance	Attach	<a href="http://www.illinois.gov/ipo/services/governance/Pages/default.aspx">http://www.illinois.gov/ipo/services/governance/Pages/default.aspx</a>	N	X	X			X									
Requisition	CMIS	New Furniture Purchase Form (Surplus Waiver)	Attach	<a href="http://omc.partner.illinois.gov/ipo/Forms/Documents/New%20furniture%20purchase%20form.pdf">http://omc.partner.illinois.gov/ipo/Forms/Documents/New%20furniture%20purchase%20form.pdf</a>	N	X	X		X	X	X				X		X	X	X
Requisition	CMIS	Non-Usage Fleet Request	Form	BidBuy	N	X	X		X	X							X		
Requisition	CMIS	Service Procurement and Contracting Checklist	Attach	<a href="http://omc.partner.illinois.gov/ipo/Forms/Documents/Labor%20Relations%20Checklist%20March%202014.pdf">http://omc.partner.illinois.gov/ipo/Forms/Documents/Labor%20Relations%20Checklist%20March%202014.pdf</a>	N	X	X		X	X	X		X		X		X	X	X
Requisition	PPB	Sole Source Form (part 1)	PPB Doc	<a href="http://www.illinois.gov/ipo/Documents/331/F%20140301%20V5.1%20for%20Dist.docx">http://www.illinois.gov/ipo/Documents/331/F%20140301%20V5.1%20for%20Dist.docx</a>	Y					X									
Requisition	CMIS	Space Req Form	Attach	CMIS	N			X											
Requisition	CMIS	State Use Committee Approval Form	Attach	CMIS	N						X								
Requisition	CMIS	Usage Fleet Request	Form	BidBuy	N	X	X		X	X							X		
Bid	CPO-GS (Solicitation) IFB		Attach	<a href="http://www.illinois.gov/ipo/general/Pages/DoingBusinesswithStateAgencies.aspx">http://www.illinois.gov/ipo/general/Pages/DoingBusinesswithStateAgencies.aspx</a>	Y	X													
Bid	CPO-GS (Solicitation) P & A		Attach	<a href="http://www.illinois.gov/ipo/general/Pages/DoingBusinesswithStateAgencies.aspx">http://www.illinois.gov/ipo/general/Pages/DoingBusinesswithStateAgencies.aspx</a>	Y		X												
Bid	CPO-GS (Solicitation) GBS		Attach		Y								X						
Bid	CPO-GS (Solicitation) RFP		Attach	<a href="http://www.illinois.gov/ipo/general/Pages/DoingBusinesswithStateAgencies.aspx/general/SiteAssets/Pages/SolicitationandContractTemplates/RFP%20Template%20V.18.1.docx">http://www.illinois.gov/ipo/general/Pages/DoingBusinesswithStateAgencies.aspx/general/SiteAssets/Pages/SolicitationandContractTemplates/RFP%20Template%20V.18.1.docx</a>	Y		X												
Bid	CDB	266 Submittal Form	Attach	<a href="http://www.illinois.gov/odb/business/library/Documents/266%20FORM.pdf">http://www.illinois.gov/odb/business/library/Documents/266%20FORM.pdf</a>	Y								X						
Bid	Agency	Agency Vet Form	Attach	Agency	N	X	X						X						







## Appendix C: Custom Columns

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### Appendix C - Custom Columns

#### Requisition

Column Label*	Column Description	Document Tab
Agency Reference Number	Used for reporting/tracking; enter any applicable Agency-generated reference number	General
Special Procurement Type: If any yes, please complete and attach the applicable Form or Attachment	Select as applicable	General
Link to Original Contract	Allows user to establish a hyperlink to another BidBuy document using an Advanced Search feature	General
Skip Transaction (If yes, transaction is NOT sent to AIS)	AIS Agencies Only	General
Additional NIGP Code	Use to identify additional codes for the BP user to notify vendors on the Bid of the opportunity	Items
Will Federal Funds be used?	Select 'Yes' if Federal Funds will be used	Accounting
If yes, please provide the CFDA#.	Appears when 'Will Fed Funds be used?' is marked 'Yes'	Accounting
Will a Grant Funding Source be used?	Select 'Yes' if Grant Funding will be used	Accounting

#### BID

SPO Name	Enter SPO name	Bid
Agency Reference Number	Used for reporting/tracking; enter any applicable Agency-generated reference number	Bid
Special Procurement Rationale	Select as applicable	Bid



Emergency Rationale	Appears when 'Special Procurement Rationale' is set to 'Emergency'. Enter narrative to provide justification for using this special procurement method	Bid
Sole Source Rationale	Appears when 'Special Procurement Rationale' is set to 'Sole Source'. Enter narrative to provide justification for using this special procurement method	Bid
Has the approved State Use Request Form and Authorization Letter been attached?	Appears when 'Special Procurement Rationale' is set to 'State Use'. Indicate whether applicable files/forms have been attached	Bid
Brand Name	Used for reporting/tracking; mark whether specifications require a Brand Name item or service	Bid
Is this subject to Small Business Set Aside?	Used for reporting/tracking; mark whether this procurement meets the definition of one of the 673 mandated NIGP Code categories and/or dollar threshold that requires soliciting from qualified, registered SBSP vendors	Bid
Are you utilizing an active, registered Small Business Set Aside Vendor?	Appears when 'Is this subject to Small Business Set Aside?' is marked 'Yes'. Indicate whether a registered SBSP vendor will be solicited	Bid
Did you complete and attach the Small Business Set Aside Waiver form?	Appears when 'Are you utilizing an active, registered Small Business Set Aside Vendor?' is marked 'No'. Indicate whether a Small Business Set Aside Waiver has been completed and attached.	Bid
Potential BEP/VBP Participation Goal? Only if estimated amount is >= \$250,000	Used for tracking/reporting purposes; mark whether specifications include BEP/VBP participation goals	Bid
Link to Original Contract (for a Renewal or Change Order)	Allows user to establish a hyperlink to another BidBuy document using an Advanced Search feature	Bid
Original Bid Number (for a Renewal or Change Order)	Allows user to identify an original Bid Number, as applicable	Bid
Original Reference Bid Post Date (for a Renewal or Change Order)	Allows user to identify the date the original Bid was posted, as applicable	Bid
Additional NIGP Code	Use to identify additional codes for the BP user to notify vendors on the Bid of the opportunity	Bid
Will Federal Funds be used?	Select 'Yes' if Federal Funds will be used	Bid

If yes, please provide the CFDA#.	Appears when 'Will Fed Funds be used?' is marked 'Yes'	Bid
Will a Grant Funding Source be used?	Select 'Yes' if Grant Funding will be used	Bid

### Purchase Order

Agency Reference Number	Used for reporting/tracking; enter any applicable Agency-generated reference number	General
Original Contract No.	Needed for novation and assignments. This custom column is required anytime the original contract no. is needed. (SAMS or AIS)	General
Bulletin Reference Number		General
Publication Date		General
Special Procurement Type	Select as applicable	General
Emergency Affidavit Date		General
Is this subject to Small Business Set Aside?	Used for reporting/tracking; mark whether this procurement meets the definition of one of the 673 mandated NIGP Code categories and/or dollar threshold that requires soliciting from qualified, registered SBSP vendors	General
Are you utilizing an active, registered Small Business Set Aside Vendor?	Appears when 'Is this subject to Small Business Set Aside?' is marked 'Yes'. Indicate whether a registered SBSP vendor will be solicited	General
Did you complete and attach the Small Business Set Aside Waiver form?	Appears when 'Are you utilizing an active, registered Small Business Set Aside Vendor?' is marked 'No'. Indicate whether a Small Business Set Aside Waiver has been completed and attached.	General
Are there any items on this PO on the current CPO Approved ICI List?		General
Has the ICI Preference Waiver been attached?		General
Actual Contract Begin Date		General
Actual Contract End Date		General
Date Contract Executed	n/a	General

Number of Renewals (number of times you can renew)	n/a	General
Number of Renewal Terms (number of units in one renewal)	n/a	General
Renewal Term Units (renewal indicator; ex months, years, etc)	n/a	General
Next Renewal Start Date		General
Fiscal Year of Obligation	n/a	General
Transaction Code-Prefix (first 2 digits)	AIS Agencies Only	General
Transaction Code-Suffix (last 2 digits)	AIS Agencies Only	General
Master Contract?		General
Master Contract?	AIS Agencies Only	General
Subcontractor Utilization		General
Skip Transaction (If yes, transaction is not sent to AIS)	AIS Agencies Only	General
Original Contract No (Novation/Assignment only)	n/a	General
Subcontractor Disclosed?		General
Travel Indicator		General
Travel Amount		General
Fixed Price?		General
Advance Payment?		General
Incoterm Key		General
Usage % Alert	Please enter the whole percentage, such as 10 for 10%, in which you would like to receive an alert regarding the usage of this contract.	General
Validity Alert (Days)	To receive an alert regarding the number of remaining contract days, please enter a whole number days.	General
Additional NIGP Code	Use to identify additional codes for the BP user to notify vendors on the Bid of the opportunity	Items

Fixed/Variable	AIS Agencies Only	Item
SAP Material Master Number	n/a	Item
Will Federal Funds be used?	Select 'Yes' if Federal Funds will be used	Accounting
If yes, please provide the CFDA#.	Appears when 'Will Fed Funds be used?' is marked 'Yes'	Accounting
Will a Grant Funding Source be used?	Select 'Yes' if Grant Funding will be used	Accounting



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